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Five high school business education teachers reviewed over 1,500 articles which had been published in the "Business Education Forum" beginning in 1947. Articles selected to be included in this yearbook were felt to be of special value to the high school classroom teacher of business and office occupations. The articles chosen may present different viewpoints and the reader should weigh the merits of each and arrive at a decision which is satisfying to him. Seventy-two articles are presented in 11 sections, which cover (1) enrichment of the subject matter, (2) effective teaching procedures, (3) suggested standards and evaluation, (4) improving personality, (5) effective guidance, (6) utilizing instructional media, (7) The impact of national business entrance test, and (11) future business leaders of America. (MM)

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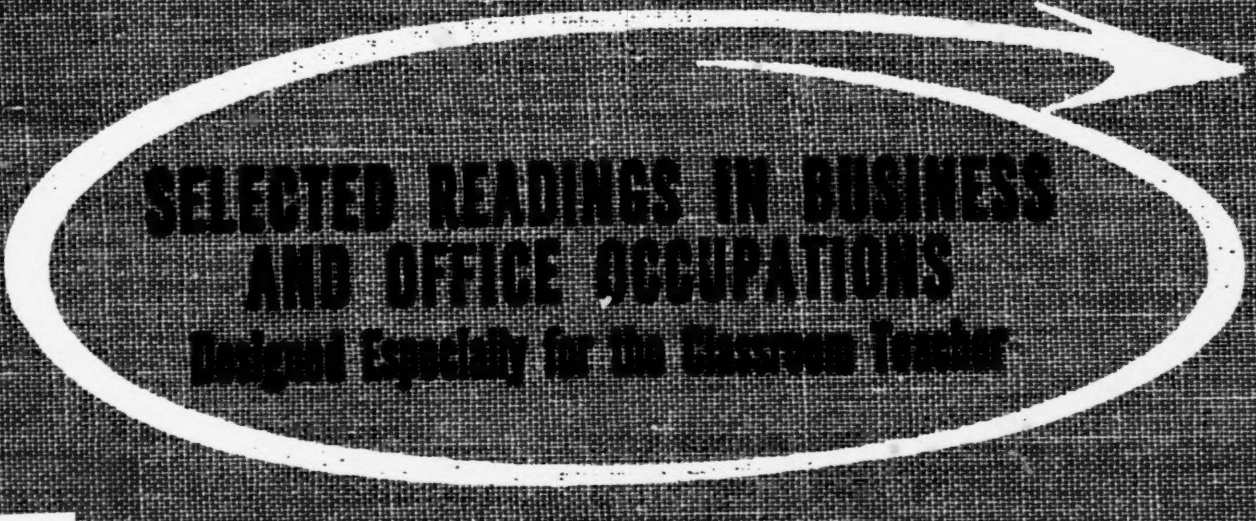

# SELECTED READINGS IN BUSINESS AND OFFICE OCCUPATIONS

Designed Especially for the Classroom Teacher

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# SELECTED READINGS IN BUSINESS AND OFFICE OCCUPATIONS

## — Designed Especially for the Classroom Teacher

NATIONAL BUSINESS EDUCATION YEARBOOK, NO. 5

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Grand Forks, North Dakota

2
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U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION

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SELECTED READINGS IN BUSINESS AND OFFICE OCCUPATIONS
—DESIGNED ESPECIALLY FOR THE CLASSROOM TEACHER

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# SELECTED READINGS IN BUSINESS AND OFFICE OCCUPATIONS

# Introduction

The enactment of the Vocational Education Act of 1963 and related legislation provides a new challenge to business teachers involved in instruction for business and office occupations. Since teaching in this area requires more than the ability to follow a textbook chapter by chapter, day by day, there has been an expressed need for guidance in the varied teaching procedures which may be used.

Through the years the literature of business education has been rich in articles which present worthwhile teaching procedures. In this NATIONAL BUSINESS EDUCATION YEARBOOK, an effort has been made to bring under one cover selected articles which might be of special value to the high school classroom teacher of business and office occupations.

Five high school teachers made up a Board of Selection. All were experienced in the teaching of business and office occupations. Each of the five regions of the National Business Education Association was represented. The editor of the YEARBOOK is a secondary school teacher and the associate editor recently left high school teaching and is now actively engaged in the preparation of business teachers. It is evident, therefore, that the viewpoint of the high school classroom teacher was an important factor in the selection of the articles for this YEARBOOK.

Over 1,500 articles which had been published in the BUSINESS EDUCATION FORUM were reviewed. Articles from the early issues of the FORUM, beginning in 1947, were included in the survey, but those finally selected were taken almost entirely from the issues of the past five years. It was thought that recency of publication was exceedingly important. Contributors of some of the articles which were published before 1965 and which contained statistical information were given the opportunity to update their material. Therefore, recent data may appear in articles which were published at an earlier date.

## INTRODUCTION (Continued)

Undoubtedly many readers will wonder why certain articles were selected while others were omitted. In the effort to present representative articles in each of the subjects included in the preparation for work in the business and office occupations, and also to maintain some balance among the various chapters, it was necessary to limit the number of articles used. Some of those selected would be equally suitable for use in chapters other than the ones to which they were assigned. It is therefore hoped that the reader will turn to the various chapters in his search for articles of special interest to him.

Value to the high school classroom teacher was probably the most important of the criteria used in the selection of articles. Some articles were selected with the inexperienced teacher in mind, while others were considered to be of greater interest to the experienced teacher.

The articles chosen may present differing or even opposing viewpoints. These should challenge the reader to weigh the merits of each and arrive at a decision which is satisfying to him.

It is hoped that this YEARBOOK will be of value not only to teachers of business and office occupations, but also to students in graduate and undergraduate classes studying procedures for improving instruction in these business subjects.

The editors believe that the subjects selected for inclusion in this YEARBOOK furnish the capstone for the preparation of students who will go into business offices. Surely these finishing courses should be preceded by a sound foundation in general education and basic business courses to the extent that the high school student's program will permit.

*Editor*: DOROTHY L. TRAVIS

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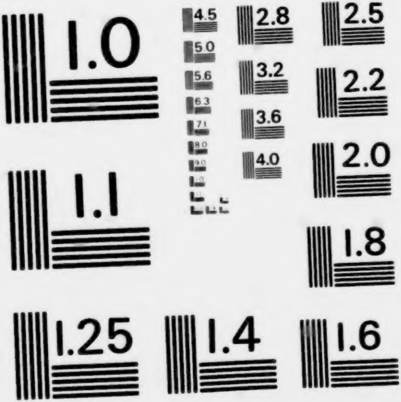
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Many persons have assisted in the preparation of this NATIONAL BUSINESS EDUCATION YEARBOOK. Special appreciation is extended to Lorraine Missling, Wisconsin State University, Eau Claire, for her suggestions and counsel as associate editor and for the many hours she has devoted to the reading and selection of articles.

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Keen appreciation is extended to NBEA Executive Director Hollis Guy. The YEARBOOK could not have been completed in the short time allotted without his able assistance.—DOROTHY L. TRAVIS.

# 1

# Enrichment of the Subject Matter

## OFFICE PRACTICE AND OFFICE MACHINES

### 1. Wanted—A Specialized Office Clerical Curriculum

**PARKER LILES,** Georgia State College, Atlanta, Georgia

In the decade of the forties, research studies revealed through job analysis studies the activities performed in the various clerical tasks. As a consequence of these findings, the present content of clerical training evolved within a fairly short time.

Strange as it may seem, since the newness wore off after the discovery and early development of this new phase of office education, little progress has been achieved. The past decade has been characterized by what may be termed a somewhat static condition with regard to content, methods of teaching, textbooks, curriculum, and number of students enrolled.

First, it is not necessary to re-establish the need for clerical training. This has been done many times by many people. It is definitely known that approximately three times as many people are employed in the clerical occupations as in the stenographic field. Yet the number of students enrolled in secretarial training is probably much greater than three times as many as are enrolled in clerical training. There are relatively few high schools that have no secretarial programs. Why? Is the secretarial curriculum a prestige curriculum, and does it therefore attract most of the students? Do administrators fail to recognize the need for clerical training, and are they uninformed concerning what constitutes adequate clerical training? Do teachers prefer to teach the secretarial skills and resist offering and teaching the clerical skills? Are the teaching materials unsatisfactory? Or do all of these causes contribute to the present condition?

Second, in a large percentage of the high schools where some type of clerical program is offered, it is done on a limited basis. This happens often as a result of business education being offered solely in the form of elective subjects. Thus, no definite sequence of subjects is established and no definite number of subjects is required. The student merely takes what he chooses or "dabbles," as it were. In cases of this type, the student often takes a year of "clerical practice," a year of typewriting or sometimes two years, and one or more other electives. Certainly the student is not to be censored for this because there is no definite or specialized curriculum set up for him to follow and no one to guide him in the proper choice of electives in case they are available. And teachers frequently are content in the belief that such a hit-or-miss program results in vocational competence. It is recognized, of course, that in certain large high schools good clerical curriculums do exist.

What is wrong with this type of program in clerical training in the secondary school? First, in an elective curriculum, no two students, except by chance, take the same subjects or the same number of subjects. Therefore, students graduate with widely varying degrees of competency. Second, one year of clerical training can hardly produce vocational competency. Do we agree that one year of shorthand or one year of distributive education produces vocational competence? Certainly not. Then why do we profess to be offering a clerical program, the backbone of which is one year of "clerical practice"? Such a program is still further weakened by the fact that the clerical practice course often includes training in office machines. This practice usually results in acquaintanceship-type machine training of a superficial nature. On the other hand, if the major portion of the clerical practice course is devoted to machine training, then an insufficient amount of time is devoted to filing, clerical typewriting, telephone techniques, handling mail, sorting and classifying, and other major clerical tasks. In either case, one or more important phases of clerical training suffers.

What are the essential factors which comprise an adequate clerical program? Research has revealed that the four major areas of clerical training can be effectively accomplished by the following courses: typewriting, filing, office machines, and clerical training. Probably the most important single skill which any clerical trainee should have is typewriting. One year typewriting for the clerical major is not enough. The first year should be devoted to building basic skill. In addition to increasing basic skills to a high degree of competence, the second year should be devoted to production typewriting and applied clerical typewriting.

Filing should be given sufficient curriculum time to ensure the development of vocational competence. The customary short unit or project merely results in acquaintanceship training. A separate course or a unit of six to nine weeks in the clerical training sequence is necessary.

The third area of competence required of clerical workers is skill in the use of adding, calculating, duplicating, and transcribing machines. To accomplish this, a separate course in office machines is necessary. One semester only results in skill of the acquaintanceship type. A one-year course in office machines should be a standard requirement in all clerical curriculums.

Another major course in the clerical curriculum should be a two-year sequence called clerical training, office clerical, or other appropriate title. Some of the important activities or units of which it should consist are the following: checking, sorting, and classifying; telephone techniques; handling incoming and outgoing mail; recording or posting; cashiering; receiving callers; and the like. If appropriate emphasis is given in this course to posting to accounts receivable records and accounts payable, cashier and payroll activities, simple journalizing, and the like, there is no justification for a separate so-called "recordkeeping" course in the clerical curriculum. In other words these knowledges and skills should be incorporated as units or chapters into the two-year subject sequence called "clerical training."

Perhaps the greatest need in the clerical field at present is a two-year textbook embodying the content previously described, preceded by certain basic skill training. With adequate teaching materials, there is little doubt that the two-year clerical curriculum would assume its rightful place in the secondary school. Teachers and administrators would welcome these materials with enthusiasm. Until such materials appear, the uniformity of course requirements which characterizes the secretarial curriculum and others will never materialize.

In summary, a specialized clerical curriculum should include two units in typewriting, one unit in business machines, two units in clerical training, and adequate provisions for filing as a half unit or included in the two-year clerical sequence. Thus a minimum of only five or five and one-half units would be required.

# 2. Teach for Office Employment

**L. MILLARD COLLINS,** International Business Machines Corporation,
New York, New York

It is difficult for any school system to control the career paths of its students. However, curriculum directors and business teachers can plan and control the curriculum and the contents of the courses. Oftentimes we have provided more time to teach the basic skills in the area of typewriting and shorthand but have not provided for the related knowledge to give these two office skills momentum. Office supervisors, administrative managers, and executives agree that the basic skills are adequate when there is a balance between acceleration and accuracy. The teacher should keep these two fundamentals in mind when teaching the typewriting, shorthand, and transcription skills.

Letters or personal inquiries as to how soon the secretary, stenographer, typist, or file clerk will become extinct in American business are frequent. I do not see this on the horizon. Records, statistical data, facts, and information are currently at an all-time high in business, government, and educational offices. Yet the production rate does not always meet an acceptable standard. When skills are taught in the shortest time, more curriculum and student time is available to stress experiences more closely aligned to the everyday operations of an office. Business teachers must emphasize required standards of performance, but first make certain that all areas of the curriculum are included. Students should not be permitted to use office equipment application procedures on a limited basis only. This is particularly true when a number of office tasks are to be coped with on the initial job in order to implement the basic typewriting, shorthand, and transcription skills. Related knowledges as to what, when, and how add substantially to the basic skills.

Office machines and related equipment should be placed in the office practice classroom on the basis of their use frequency in the business office. Standardization of equipment based on true educational advantages makes for better teaching. Business teachers using a well-thought-out rotational plan can provide more than mere familiarization in machine operations. Most of the applications serve a definite purpose and students should develop a knowledge of the application and a complete understanding of why it is needed as a support for the management process. Reproduction processes and copying machines are used quite extensively in various office operations and in all types of companies—small, medium, and large. However, the quality of the work is often left entirely with the operator. Beginning clerical workers and typists may be held responsible for producing work requiring varying degrees of usability. The field of graphic arts, including proper arrangement, plus an understanding of the best and most economical reproduction process, should be part of the office or secretarial practice course content. The beginning worker is more comfortable when he understands these processes. These processes can be taught in a minimum number of hours under a good teacher's direction. Is not this educational process more sensible than having the beginning worker receive 15 minutes of instruction from a co-worker and then have the quality of his work questioned because he had neither the necessary introductory knowledge nor an appreciation of management's needs?

Perhaps you have a question. What are these related knowledges that become a composite of the student's employable skill? In the last decade statistical typewriting has increased considerably, yet many beginners cannot handle the statistical requirement in letters, special reports, financial statements, sales records, and the like, because they have not been exposed to them in their classroom training to any substantial degree. Technical typewriting requires skillful handling. Scientific or mathematical symbols used in the space age require proper arrangement in order to be acceptable to the reader. Many companies and government agencies are constantly preparing specifications and proposals requiring scientific and mathematical adaptations which were relatively unknown in the business office just a few years ago.

The use of forms in American business has tripled and tripled again in the past two decades. Many of these forms are well arranged through the science of form design. Yet, beginners have difficulty in filling in the form with a rate of production that meets the standard in an office. It would be interesting to survey one of the largest business firms in your own teaching community to determine the number of forms used on a daily or even hourly basis. Many times the experienced worker is expected to verify data of a mathematical or scientific nature before the forms are typed. This verification of data requires maturity and know-how to reduce the number of errors in management reporting.

Records management has made progress by making filing a significant part of the work schedule. Too many beginning workers have little understanding of the basic systems such as alphabetic and numeric filing. It is conceivable that an initial job will require an employee to assist in revamping and improving the filing system regardless of the size of the company with whom the beginner may be employed.

One of the biggest changes in the modern office is in the area of communication through various types of dictation media versus the boss and secretary doubling their working time through joint work sessions. Transcription training provides the secretary with the skill to listen and type versus the look-and-type approach only. Knowledge of machine transcription does not replace the need for shorthand skill, but adds another plus for those seeking office employment.

Basic skills can be taught in less time. In fact, in years past we did teach them in less time. Thus, the additional course time can be used for technical training in our office or secretarial practice areas to include medical, legal, banking, insurance, engineering, and scientific terminology. Furthermore, the business teacher must teach the related knowledges such as the ability to proofread, detect errors in spelling and grammar, and the development of telephone techniques. These should be woven into the daily teaching process. Believe it or not, beginning employees who survive and have the opportunity to advance to top level jobs as secretaries, senior secretaries, executive secretaries, or administrative assistants, are required to master these skills effectively even though they may not have mastered them completely while in the classroom.

Business educators have given much consideration to the typewriting, shorthand, and transcription rates of students, but the environment in which these rates have been recorded is somewhat unrealistic. A straight copy typing rate does not fortify the student who is compelled to work with diversified dictation and varied applications. Transcription rates on four, five, or even seven letters does not fortify the beginning stenographer who is confronted with fifteen letters, plus the normal office interruptions of telephone, mail, and callers in addition to the routine office chores. Can't we add a few of these problems in our advanced training and then check the production rate, measuring the number of mailable letters produced from this typical office environment?

Beginning stenographers are often assigned to the secretarial services area or stenographic pool. Although there is an element of training involved, this is at a bare minimum and beginners are expected to have the basic skills developed to a high degree which will allow time for training in the company's specific needs. It would be well for business teachers to visit a company having this type of operation to ascertain what is expected of beginners in the secretarial and clerical field. This enables the business teacher to bring a realistic approach to the classroom.

Job requirements, office equipment, and supplies change on a constant basis. A beginning office employee may be faced with a confusing array of type styles, carbon paper, ribbons, stencils, reproduction masters, and the like, and is expected to select the right one to accomplish a particular job. Manufacturers are cognizant of the need for proper instruction and are pleased to arrange for a technical presentation. Teachers as well as students can profit from such special sessions and thus expand their area of knowledge.

We know that many students will not enter the secretarial field but must be trained for other areas of business. In recent years the interest of business teachers in data processing has been on a constant increase. Perhaps many schools will find it impossible to have a complete data processing center. However, even though data processing is a scientific area, the business concept can be presented to students by business teachers without the full array of equipment. This introduction and understanding can fortify the student who may enter a data processing center to work and receive additional training simultaneously. The apt beginner may have an opportunity to move into a data processing installation via his ability to file, operate a card punch machine, or skill in typewriting. With additional training and further education, the alert beginner may advance to the position of tape librarian or eventually a junior programmer. In recent years it has become evident that many young persons who do not complete college may fit well into a data processing center. The management of these departments must be supported by a number of technicians who have been given a basic understanding of this technical application.

This is your challenge—to equip students for a multiplicity of office occupations; to teach more, teach it better, and teach it in less time; and finally to instill in your students the willingness to tackle a new job with confidence, initiative, and know-how.

## 3. A New Contour for the Clerical Program

**MARY MARGARET BRADY,** Southern Illinois University, Edwardsville

To keep pace with technological advances in business, the general clerical program needs a face lifting—a new contour or outline. Without doubt there is still a demand for clerical workers in the business office, but the tasks performed are different from those of a few years or even a few months ago; the machines and skills are changing, too. In order to bring the contour of the general clerical program into line with the demands of the new office technology, business teachers should consider the following questions: (a) What are the machines to be used and the consequent preparation needed by tomorrow's clerical worker? (b) What new knowledges, attitudes, and understandings do our general clerical students need today? Answers to these questions will provide the changed contour we seek for new general clerical programs.

### Office Technology and Operational Needs

In a modern office, a clerical worker has a diversity of machines to operate—adding and listing machines, calculators, accounting machines, typewriters, copying machines, card punch, and others; all are common tools of the general clerical worker today. Let us consider briefly some of these in terms of machine improvements and their influence on the preparation of general clerks.

A knowledge of the techniques of operating adding and listing, rotary and key-driven calculators, and various kinds of accounting machines will continue to be important for the clerical worker of tomorrow. Not only should he be familiar with the various operational parts of these, but he should also be able to select the one machine most appropriate to perform a job task. A knowledge of the problems that can be solved by each type of adding, calculating, and accounting machine is as important as the development of a high degree of operational skill.

In our changing technology, the full-keyboard, adding-calculating machine is now often equipped with a punched-paper tape attachment which records information directly from source data. This punched tape, as a by-product, is then used to actuate electronic equipment for further processing. Such a new use of the full-keyboard machine illustrates the need for continued instruction on this type of keyboard. Tomorrow's clerical worker should know how to solve problems on rotary and key-driven calculators so that the operating parts of the machine are used efficiently. Computational tools such as these, with varying improvements, will continue to be important in the preparation of general clerical workers.

### The Typewriter Still a Basic Machine

The typewriter, with its many improvements, is still the basic machine in the office today. Now it is often electric, giving the operator an opportunity to increase his production. The typewriter may also have an attachment which prepares a punched-paper tape as a by-product of typewriting a letter or other document. The tape may be used on an automatic typewriter to produce original copies at the rate of approximately 120 words a minute or to address envelopes. Typewriters, known as slave units, may also be hooked in tandem so that the same information may be typed on two or more documents at once. Thus, invoices and bills of lading could be typed at the same time, and a paper tape may also be punched at the same time for electronic data processing.

Other features of a typewriter with which the clerical worker should be familiar are proportional spacing, automatic justification of line length, half-spacing, and interchangeable type—all features which make the work of typewriting more interesting and efficient. And, of course, an increasingly important tool used in conjunction with the typewriter is the desk copying machine.

### Improved Methods of Duplication

General clerical workers should be thoroughly familiar with the techniques of preparing masters for stencil, liquid-process, and offset duplicators. Instruction in the operation of duplicating machines is desirable. It is even more important, though, that instruction be given in the effective preparation of masters.

Instruction for the preparation of stencils should include as always the basic techniques of readying the typewriter, instructions in the manner of typewriting and making corrections, following the line limitations, and placing the material on the stencil. In addition, the clerical worker should be able to select the kind of stencil to use according to the copy desired. This selection involves the choice of stencil color and quality, film or nonfilm stencil, and top-printed, die-impressed, or plain stencils. The worker should know how to make pasteups for electric scanning and how to use insets.

Improvements in liquid process duplicating make the typewriting of masters a more frequent occurrence than in the past. The clerical worker needs to be familiar with the different types of masters available and should know the various ways of making corrections effectively. Form typewriting is frequently used for systems work in the preparation of purchase orders, invoices, work orders, and similar tasks where multiple copies are needed. Such fill-in work requires that the clerical worker should be skilled in the accurate typewriting of numbers and the placement of data on forms.

The clerical typist often prepares masters for the offset process. Such work may require the typewriting of the material on a paper master or the typewriting of the copy for photography. In the latter case, accuracy is necessary as poor erasures are easily reproduced in the photographic process. The clerical worker may also prepare paste-ups for photography in connection with the offset process. It is recommended that students become familiar with the process by observing it in some office, by discussing the principles involved, and by preparing at least one paper master and a paste-up copy.

### The Transcribing Machine

The clerical worker of today, with many of his routine duties eliminated by the new technology, may find his place in the office through using transcription equipment. The use of plastic discs or belts, tape, or magnetic belts of newer machines provides the transcriber with clear and pleasant dictation. The use of portable dictating machines to record on the road, at home, or carried about the plant means that more and more dictation will be given in this manner so that the clerical worker may be called upon to do more transcription. Instruction in grammatical structure, punctuation, and spelling must be given more emphasis in the general program.

### Our New Technology

With the advent of punched-paper and magnetic tapes, optical scanning, and magnetic ink, it might be expected that the punched card would disappear, but this is not so. The punched card has its own special place in the new technology. Definite advantages to business of using punched cards are the way they provide historical records, a quick means of sorting information, and rapid location of information. Clerical workers will still be operating the key punch machine, but it is questionable whether instruction on this machine should be given in the classroom. Rather it would be more helpful to develop an understanding of the basic machines used in punched card accounting such as the sorter, the tabulator, and the accounting machine; and to explain how the punched card may be used in the operation of the electronic computer. The clerical worker should understand that the punched card is used both for programing a computer and for providing the information needed for the various jobs to be performed on the computer.

Optical scanning is changing many routine clerical tasks. For example, no longer will the clerical worker need to handle forms returned by the customer with his payment. These forms will be fed directly into the optical scanner and the account automatically updated. This and similar uses of optical scanning will reduce much of today's routine clerical work.

Clerical workers formerly spent hours of time in processing data received in the home office from branches or sales offices. Now these data may be transmitted in seconds by teleprocessing systems. Cards are automatically punched as data are received and thus the information may be processed in a computer or accounting machine, eliminating routine by a clerical worker.

Magnetic ink is an innovation of the new technology used especially in processing of bank records. Personal checks and deposit slips have the account number printed on them in magnetic ink. When these papers come to the bank, the clerical worker may add other magnetic numbers by the use of "an account number encoder." Then the checks and slips go to a high speed reader-sorter and thus to the computer. The use of magnetic ink has reduced clerical work in banks.

There are numerous other machines affecting the clerical worker of tomorrow. In the mail room there is an increasing use of folding, sealing, and stamping machines. A "desk-fax" machine with its electric eye to scan and transmit pictures of telegrams to the telegraph office or to operate a closed-circuit private-wire system for intra-office communications is also changing the nature of clerical work.

Clerical filing tasks are changing, too. Open-shelf filing instead of four- or five-drawer filing saves time for the file clerk. The use of the terminal-digit system is improving the control over files and is saving time in the sorting process.

A word of warning is needed—the new technology has not eliminated the necessity for legible handwriting, an art which is fast disappearing and which should be stressed in the general clerical program. Special emphasis should be placed on the legible writing of numbers. When preparing input material for a computer, for example, there is no place for guessing at a poorly written numeral.

Tomorrow there will be machines unfamiliar to the clerical worker of today. These new machines are bringing an essence of newness, of variety, and an opportunity to depart from the old repetitious routines. They provide the general clerical worker an opportunity to develop different abilities in keeping with the new technology.

The general clerical worker needs to know how to think and to think creatively if he is to progress in office work. The new technology has eliminated many routine tasks. Students in the clerical program should be encouraged to think and to use good judgment. To be the creative, thinking worker needed, a knowledge of the basic principles of electronic data processing is essential. Students will obtain an understanding of these from demonstrations, discussions, and visits to modern offices. The clerical worker who enters the office with some background in these new electronic machines will be able to adjust more readily to his job.

The clerical worker should be aware of the increased need for accuracy in his work. An understanding of the flow of work and the way each operation "fits" will help the worker to understand how the task which he is performing is a part of the end result and, therefore, must be accurate if the final result is to be correct.

Certainly, tomorrow's clerical work (and today's!) must develop the ability to read and follow instructions. Most clerical workers do not come to us with much creative ability or the capacity for thinking, but we must make them realize the necessity for using the ability they do possess to the utmost to understand and to perform in their work.

In tomorrow's general clerical work, almost every job opened by automation will demand more education and training. For these new jobs, a background in fundamentals is essential; precision and accuracy in machine operation is a necessity. Tomorrow's clerical worker (today's student) must develop an appreciation of the new technology. He must realize the possibilities which await him if he works carefully and with understanding, and if he keeps abreast of new developments.

## 4. What Office Training Teachers Should Tell Students About Copiers

**BELDEN MENKUS,** Kennecott Copper Corporation, New York, N. Y.

Which machine should an office use to make a copy of a letter, a newspaper clipping, a flow diagram, a file card, or part of a catalog? What should office training students be taught about copying machines? Here are some things one specialist says are important. He says that making a decision about a copier involves answering these questions:

1. *What type of material will be copied?* Despite manufacturers' claims, some copiers handle colors better than others. Some are better suited for copying photographs and halftones. On some, file cards, lightweight sheets, and many forms must be inserted into a special carrier before being copied. Some copiers will not accept originals that exceed a certain thickness. Some will not handle rigid or bound materials.
2. *How many copies will be required?* It is common for the copying volume to increase three to five times in the first three months after installation of an improved copier. Machines that produce multiple copies rapidly are needed where a situation regularly involves high volume copying.
3. *What copy quality is required?* Image and paper quality are considerations only if the copy is to go outside the company.
4. *What operating and maintenance problems will be encountered?* Some copiers require extremely precise exposure adjustments to compensate for differences in originals. Two-step processes require greater operator skill and additional production time.

   Some copy and master papers must be specially handled and stored to prevent premature exposure. Copies delivered moist from wet process machines must be dried before they can be used. Fluid used in liquid developer processes must be changed frequently to maintain copy quality.
5. *How will it actually perform?* An on-premises demonstration is essential. Have the copier placed in the exact spot you plan to use it. Find out if its operation will overload your present electrical circuits and if good copies can be made only under special lighting conditions. Arrange a sufficiently long demonstration to assure that the equipment can adequately handle the kind and volume of materials to be copied.
6. *What will a copy cost?* Quality and expense of maintenance service affect copy cost. There are few things as worthless as an inoperative copier. As a rule of thumb, add one-third to a manufacturer's quoted per-copy cost to approximate actual cost. Multiply this figure by 2.5 (as an allowance for employee time lost) to arrive at a realistic per-copy cost. For example: Manufacturer's quoted per-copy cost is 4

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This article, condensed and slightly reorganized from an article in The Office for March 1966, is presented with the permission of the publisher, Office Publication, Inc., Stamford, Connecticut. Mr. Menkus is the editor of *Systems Magazine*.

cents. One-third of 4 is 1.33. Add 1.33 to 4 to get 5.33; multiply 5.33 by 2.5 to arrive at the per-copy cost of 13 cents.

*Copy Cost.* Even though the cost per copy has dropped, the total copying bill in business has continued to rise. Management is tolerating in copier use today a type of waste and equipment abuse that it permits nowhere else.

In large organizations the best way to control copier cost seems to be through equipment centralization. Centralization generally tightens use control, permits maintenance of better cost records, makes feasible standardization of operations, and improves the use of available copying capabilities. Decentralization eliminates the need for extra floor space, of hiring and training people to operate copiers, of investing in special supervisory personnel, and of keeping overhead records. Decentralization reduces or eliminates time lost by executive and clerical users in transporting copies and in problems created when processing confidential information. For example, a total of 30 minutes a day lost transporting items to and from a copier is the equivalent of losing a half-day a week.

*Copy Control.* Each company must develop the course of action that best meets the demands of its work situations. The best plan is probably some combination of centralization and decentralization—with centralized, functional control. In making the decision, a company must determine:

1. *Physical arrangement of the offices to be served by copying equipment.* For instance, neither centralization nor complete decentralization may be feasible in some parts of an organization. Large satellite copiers may need to be installed to serve jointly several offices located near each other.
2. *Delivery speed.* Some offices need copies promptly where as others can wait hours when necessary. The delivery-time requirement is related to physical layout considerations and allowances must be made for time that may be lost enroute to and from a copier.
3. *Need of some offices to limit circulation of confidential information.*
4. *Availability and cost of outside copying services.* It may be most desirable, all things considered, to have a quick service, local offset shop handle many multicopy jobs.

There is no foolproof or all-purpose way to control the number of copies made or copying costs in a company. Control has to be fitted to operating needs. Some organizations have cut costs by adding an electrostatic copier to a separate diazo copier. The electrostatic unit is regulated to make only one copy. Additional copies, when needed, cost less per copy when made on a diazo unit using a translucent electrostatic copy as the master.

Because of the inconvenience and added cost of installing copying controls, it may be impractical to restrict personal use. If this is the case, consider charging those who make personal copies the actual per-copy cost. Such revenue might pay for all of the copier use.

Where possible, restrict photocopying to situations where it is necessary to have an exact copy such as reproducing a signature or a letterhead.

*Facilitate Work.* One way in which production time is lost in duplicating is hand collating multiple copies of several pages. This procedure can be simplified by placing a six- or eight-bin letter tray at the copy delivery area. Then, reproduce the material to be copied in reverse order —last page first. The sheets may be sorted as they come from the copier.

A copier is not just a mass producer of paper. It facilitates work and is a systems and procedures tool. Let's look for ways to get more from the copy equipment investment. For example, this tool makes it possible to—

1. Provide copies for purchasing, receiving, billing, production order, and comparable systems to eliminate source data transcription.
2. Prepare distribution copies of internal reports directly from work papers or drafts. This eliminates retyping, proofing, and related costs; assures that all pertinent past figures are available; and means that recipients need not file previous copies.
3. Speed action on important correspondence by simultaneously sending copies to everyone involved. Speed handling of special orders by copying specifications and sketches.
4. Reduce correspondence handling costs and time by writing a brief reply on the original, making a copy (if necessary) for the files, and using the original letter as the reply. This can be done for external as well as internal correspondence.
5. Protect certain vital, one-of-a-kind records by making reference copies.
6. Use copies (where local laws permit) to make or settle claims thus keeping the original document in your possession.

The office copier is an accepted business tool. Wisely used, it gets the job done, improves office information processing systems and procedures, and increases overall office production.

## 5. Paperwork . . . Paperwork . . . Paperwork!

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Two developments in information processing equipment—the computer and copy machines—are inundating managers with paperwork. Modern technology has given us computers to provide important information at formerly undreamed-of speeds. But computers produce reams of print outs. Advances in duplicating and copy machines have made it so easy to run off extra copies. We usually run "just a few" extra copies "just in case." Most of the copies end up in files where too many of them stay too long. Managers and office workers are surrounded by paper, paper, paper!

*Writing.* The problem of paperwork starts with the people who write reports, letters, and other printed matter that others must read, process, and eventually store. Unfortunately technology and specialization too often bring with them a high-sounding "gobbledegook" language that is not easy to understand. Too many words are used to help prestige rather than rapid reading and understanding. Too much unimportant, and partially analyzed irrelevant information is included. Long-winded sentences result in needlessly long papers that add to stenographic, processing, filing, and storage costs as well as management reading time. Too little attention has been given to clerical costs, but even less is given to reading costs. Many of the readers of business papers are high-priced executives whose time costs too much to be wasted reading needlessly long, irrelevant, and hard-to-understand material.

The time has come for business courses of all types and at all levels to stress the high cost in business and government of written words. We need to teach business students, office workers, executives, and professional people to write with fewer words. Business correspondence training should also include what not to write.

Paperwork costs can be cut in a variety of ways. The use of telephone, teletype, and dictating machines save office clerical time. Economize when corresponding by returning the originator's request with the material requested thus saving dictating, typing, filing, and storage costs. Incoming letters often can be returned to senders with answers or comments handwritten on them. A "carbon" copy can be made on a copy machine if one is absolutely necessary for the files.

*Filing.* File drawers often reveal many bad filing practices. Those who process mail apparently find it easier to reach for file trays than wastebaskets. Papers are filed just in case someone asks for them—alibi papers. Duplicate copies of just-in-case and alibi materials clutter files. They even get into inactive storage with important ones because there is no time for the real decision makers to weed them out before transfer.

Filing training programs should emphasize what not to file. Records retention programs should pay more attention to the disposition of useless copies so that they are not transferred into storage. A simple coding system, or a review of folder contents in spare time or whenever the folder is being worked on, could make disposal a continuing process. Such a procedure would get rid of concentrated year-end reviews and reduce inactive storage.

Another way to keep useless duplicate papers out of files is to identify official file copies by a special color or imprinted designation. Then a manager can tell at a glance whether his is a file copy or an "information-only" copy—not to be filed.

*Government Paperwork.* Government reporting requirements have mushroomed with proliferation of new agencies and departments, all demanding more paperwork. Business people gripe about government reporting requirements but show an amazing lack of interest when given a chance to do something about it. This apathy hampered the Hoover Commission efforts, and threatens to tie up corrective measures now being urged by Representative Arnold Olsen's subcommittee, widely publicized in *The Federal Paperwork Jungle* report (February, 1965) available from the Government Printing Department, Washington, D.C. Even though business publications are publicizing the report and are urging that business support its recommendations, response has been amazingly poor. Prodding is needed to pass the legislation proposed by Representative Olsen's subcommittee.

A few business associations work closely with government agencies on the paperwork problem, serving on subcommittees created to curb and simplify government reporting requirements. For example, the Advisory Council on Federal Reports, formed after the first Home Commission report and described in *The Federal Paperwork Jungle,* is one such committee. But, the Council needs greater support from business and from legislators. Efforts of its member associations have deteriorated to rubber stamping requirements already approved by the Council.

The American Records Management Association is planning national representation on the advisory council. The local ARMA chapters are being urged to take part in programs to coordinate federal, state, and local government reporting requirements. Such programs need all-out support from business educators, as well as business. They are a means of keeping continuing pressure on legislators and government officials at all levels, to take corrective action. Without such support, Representative Olsen's subcommittee recommendations will deteriorate just as most early Hoover Commission proposals did—and the government paperwork jungle will worsen.

*Conclusion.* Modern technology has made significant gains in developing machines and devices to produce and reproduce information, so vital in present-day business operations, but it has caused headaches for records managers, who must control and dispose of reams of printed matter that flows from computers and copy machines into file cabinets.

Waging war on paperwork is the joint responsibility of business and educators. Business teachers must stress what not to write as well as how to write. Brevity and conciseness in writing must be taught. Filing training must emphasize what not to file as well as what and how to file. The disposal of records needs more emphasis.

Government paperwork requirements spiral steadily. Former corrective proposals and efforts have brought only minor relief. Lack of business and public support has been and continues to be a big factor in the lag. Gains in records management have not kept pace with new laws creating new government agencies—all adding paperwork to the total system.

As public interest is aroused by Representative Olsen's subcommittee report, business publications and associations urge support of the subcommittee recommendations; but response is so far undynamic. Business groups, like the American Records Management Association and others, are stepping up participation in joint programs to coordinate and simplify all government reporting requirements. However, unless businessmen and educators join in prodding business and the public to institute needed corrective measures, the government and business paperwork jungle will grow.

# 6. Receptionist and Telephone Techniques

**RUTH GRIFFITH,** Jefferson High School, Cedar Rapids, Iowa

Clerical instruction is essentially a laboratory course, a course where students learn by "doing," not by "talking." A visitor should be impressed. not with the fact that students are reciting well, but that they are engaged in meaningful activity. For example, after the preliminary instruction, students learn to operate adding and calculating machines, not by talking about them, not by watching demonstrations on them, but by actually operating the machines.

Certain units present difficulties when the teacher attempts this "doing" approach. One such problem unit is that which centers around the duties of the office receptionist.

Perhaps the easiest way to handle this unit is the questionable lecture method—questionable because many adolescents are not good listeners. Even though the lecture method has some shortcomings, the duties of the receptionist can best be introduced by a well-prepared talk. This should not be a formal lecture, the type used in college instruction; instead, there should be much class participation. This is the time to emphasize and re-emphasize the importance of the attitudes and personality traits required by the receptionist. The students must see how vital this position is. They must appreciate the fact that the receptionist is the first person in the office who meets the potential customer. The receptionist makes the favorable or the unfavorable impression for the company.

In developing this topic, the use of anecdotes of receptionists who did the right or wrong thing works well. It is not necessary to employ fiction here since talks with businessmen in the community will furnish much material, comic or serious incidents from their own offices. Students remember these amusing tales. Often the class members can contribute some stories from their own observation.

### Students List Traits

After this introduction, the students are asked to prepare a list of desirable and undesirable traits for the receptionist. Student interviews with actual receptionists will furnish valuable information. In class it is well to develop a composite list. Constant emphasis must be given to the fact that certain traits are especially important for the receptionist, traits not so necessary for some other clerical jobs. The matter of clothes and good grooming is discussed at this time.

Later the students fill out a personal attitude check list or self-evaluation chart. Here they rate themselves on many personality traits and consider the matter of dress, grooming, and health. Thus, students begin to focus attention on their own fitness for the receptionist job.

The types of activities engaged in by the receptionist follow in sequence. Class members prepare a list of duties performed by the receptionist in a small office, the worker in a large office, and the person in a specialized office such as the receptionist in a doctor's office. In developing this phase, the students write a short sketch of how a difficult situation in an office should be handled by the receptionist. Finally, individuals write solutions to such problems as what to do in case of delays for appointments, how to get information and names from unknown callers, how to handle callers without appointments, and what to do with the "problem" or "objectionable" caller.

Special reports offer interesting information. Industry furnishes challenging pamphlets. A scrapbook concerning careers for office workers with clippings from magazines and newspapers is kept and students select articles to report on in class.

One successful way to summarize the unit is through the use of a film which dramatizes correct and incorrect office technique. However, just to view the film accomplishes little. It is important that instruction be given in advance as to what will be shown. The follow-up is important, too.

There are a few times when members of the class can act as receptionists. Every possible opportunity along this line should be utilized. A student should be prepared to act as hostess when the principal visits or when there are visiting teachers or businessmen. In addition, there are situations which can be worked out with the secretary in the school office to provide actual experience.

### When Is The Unit Taught?

When in the clerical course should the unit on the receptionist be taught? It appears that the best results are obtained if the material is touched on at three different times. In the beginning of the course some attention is focused on the clerical worker's personal qualities. Here is a good opportunity to point out the fact that all clerical jobs do not require the same traits. Since the students are acquainted with the function of the receptionist, they can easily help determine the qualities most essential for successful performance of this job.

Later, about halfway through the course, the unit concerning the receptionist is taken up. Here is the opportunity to review and add to the introductory material.

Finally, near the end of the course, during consideration of jobs and applications, there is a third opportunity to emphasize personality requirements for specific jobs. Most young persons resent too much "teacher talk" about the proper traits and attitudes. Touching on this topic at three different times is a tactful way to deal with the problem—its importance cannot be over-emphasized. We in business education are fully aware of the startling figures presented by industry which show that many young people fail to hold jobs because of undesirable personality traits—traits that can be overcome if the individual is inspired to do something about them.

### Telephone Information

The chief difficulty in teaching telephone technique arises from the fact that teen-agers use the telephone so much that they think they are experts. In the first session it is necessary to revise this viewpoint. Lengthy telephone conversations do not necessarily prepare a person for acceptable office telephone procedures.

The telephone unit is previewed by the use of films secured from the local telephone company. Students should acquire certain scientific information concerning the telephone. Then, they need to acquire knowledge about the different types of services such as person-to-person calls, station-to-station calls, the difference between day and night rates, and so on.

With the use of dial telephones, individuals do not have sufficient practice in repeating telephone numbers. Yet this skill is often needed in the office when the company telephone number is given to a caller or the customer's telephone number needs to be repeated. Drill in reading numbers such as 363-0025 (read: 3 6 3, pause, oh oh 2 5) is desirable. If the telephone number is out of the area, be sure to precede the local number with the area code number (read: Area Code 2 oh 2, pause, 3 6 3, pause, oh oh 2 5). If correct procedure is not practiced, students have a tendency to run all the numbers together.

If telephone directories are available, some study should center about the use of the classified section. Students can develop considerable initiative in finding the more difficult occupations or in locating specific individuals through the use of these pages.

Drills on the proper way to answer the telephone in an office where there is no switchboard and in an office where there is a switchboard can be taught effectively through role playing. The drills can include the response of a switchboard operator and the response of an individual in the specific office called, then switching calls when the wrong office is contacted. Instruction should be given on situations where callers are asked to wait while the office worker gets information requested, how the telephone is answered when the worker returns, how to get an individual's name who wishes the employer to call back, and so on. There should be some practice in filling out the proper information on memo pads for calls received when the employer is away from the office.

Following the preliminary instruction, students should have an opportunity to actually do some telephone work. The Teletrainer, furnished without cost by the local telephone company, offers realistic instruction. Students have an opportunity to hear voices reproduced as they actually sound over the telephone. Additional work can be done on enunciation and tone quality. Finally, there are unlimited possibilities for problem situations. The Teletrainer Manual presents many problems in dialogue form. (I prefer the suggested problems better where the students work out two-way conversations.) The Teletrainer is quite novel and adds needed variety to the course.

No unit on the telephone is complete without observation and practice on the switchboard. If the school has a switchboard, the operator can demonstrate its use and the students can be given some practice. First, they should call from and answer different office telephones. Later, they can answer the switchboard and ring the various telephones in the building. One lesson here is worth many days of talking about the switchboard. This is an excellent example of "learning" by "doing."

Another motion picture at the end of the unit is helpful. By this time the students can select the good points and the mistakes made by telephone operators and receptionists. Interesting pamphlets on telephone technique are available through the telephone company for distribution to each member of the class.

Telephone personality should be stressed again and again. The students themselves should point out the difference in trait requirements for the receptionist and for the switchboard operator. They need to appreciate the meaning and importance of telephone personality and to work toward a cheerful, well-controlled, and natural voice. Our students can develop the "voice with a smile."

## 7. Work Simplification for Stenographers

**ELIZABETH MELSON,** University of Illinois, Urbana, Illinois

Work simplification and time and motion study are terms that get much attention from management today. Stenographers' jobs, too, can be simplified, and motion economy is as important for transcribers as for other workers. Unfortunately, working effectively and efficiently is not instinctive.

Much pressure and tension exist today. Time-saving, motion-eliminating procedures, learned, practiced, and made habitual, result not only in the doing of more work; but because of the smoothness which they bring, they keep frustration at a minimum. Certainly, a tendency toward fewer errors can be expected with less tension. If teachers apply common sense to the habits they teach, students will find their work easier and will have benefited from work simplification.

### Unnecessary Motions Waste Time

An examination of the stenographer's job shows that too often much time is wasted and many unnecessary motions are made through habit. To eliminate this wasted time and unnecessary motion, the teachers of shorthand, typewriting, and transcription have a responsibility to instill efficient habits early in the student's learning period. Many of these most desired activities are very simple, the kind that almost anyone would agree are basic. They will be adopted easily if others are not formed first.

*Procedure No. 1.* Many, many typists and transcribers must take their attention from the process of moving the typewriter carriage to the proper place for erasing, just to find the eraser. Looking first on one side of the machine and then the other, peeping under papers, moving the copyholder, feeling along and under the edges of the machine are common procedures in typewriting and transcription rooms and in every office. The entire process is then repeated for the next error, and the next, and the next.

*Simplified Technique for No. 1.* To have an exact and specific place for the eraser and to put it there every time so that it can be reached for, found, picked up, and brought to the correction area without looking makes sense. To instill this habit, insist that each student have a place and put the eraser there every time. Drill by stopping the class, calling "eraser." Continue until there is no fumbling.

*Procedure No. 2.* In a class where the making of carbon copies is being learned, or where the use of carbons is being practiced, few students have several "sets" or "packs" already assembled before class. An office worker will interleave several sets when she has a slack moment and place them in a folder ready for instant use. The procedure saves time in the classroom, too. (A by-product is the elimination of the one sheet of carbon turned the wrong way making a must-be-read-with-mirror copy on the back of the original.)

*Simplified Technique for No. 2.* Teach students to prepare carbon sets with a minimum of correct motions and have the steps practiced until they are done as a matter of fact.

*Procedure No. 3.* In several offices, studies show that typists whose production is measured, typewrite more strokes or lines a day when long letters are typed as opposed to short letters of one hundred to two hundred words. Obviously, output can be increased only by handling paper efficiently and in typewriting the opening and closing lines of a letter effectively. Any of these techniques the student can acquire will tend to increase his efficiency.

*Simplified Technique for No. 3.* Teach the almost simultaneous use of the carriage return and the tabulator key so that the carriage goes far enough, but does not make a full return before "tabbing" to the closing line position. Having taught the technique, see that the student uses it on every letter day after day.

*Procedure No. 4.* Many students report that the constant interruptions are most disconcerting when they are on the job. They are called for dictation, someone asks a question, the telephone rings. "I just can't get anything done," is their cry.

*Simplified Technique for No. 4.* Teach the students, when transcribing, to cancel their notes to the place where they stop at every interruption. Give students practice by stopping them in the midst of transcription and insisting that they mark through their notes to the point where they stopped even before lifting their eyes to find out what is wanted. They can resume with little loss of time and with no chance of starting at the wrong place.

*Procedure No. 5.* More than one conscientious beginning stenographer has taken home with her the many spoiled sheets from her first day's work on the job because she has been ashamed of the wastebasket full of expensive letterheads she has ruined. Although she has studied placement for short, medium, and long letters, the letters in the office have a way of not falling exactly and smoothly into any of the categories. Too, in the office there is no time for long, arithmetical processes in figuring exact placement of tabulated materials or for retyping them.

*Simplified Technique for No. 5.* For years, experienced office typists and transcribers have used judgment placement for both tabulated materials and letters. The student's ability to judge the length of letter from his shorthand notes or the amount on a disc or belt must be developed through practice. Combined with the judgment must be the ability to estimate what margins to use.

When, after typewriting a part of the letter, experienced stenographers find they have misjudged, they add a few extra line spaces here and there in the closing element of the letter or take out a line or a half-line space or make other deviations to eliminate the necessity for retyping the letter. The appearance isn't marred; probably only the trained eye of the teacher can detect the change.

Suggestions have been appearing recently in our advanced typewriting textbooks for "adjustments" in the placement plan of the letter after the letter is partially typed, but without beginning the letter over.

With practice, students become skillful at setting the letter up by judgment. Consequently, to teach the "adjustment" procedure and to give real practice in the stretching or condensing of the letter after part of it is typed, the instructor can add a short sentence or two, or delete an equal amount, after the student has started his transcription. This will make the letter too high or too low, necessitating the change of plan.

*Procedure No. 6.* Many letterwriting experts say that letters with short paragraphs have greater appeal and tend to be more effective. Teachers of letterwriting encourage the use of short paragraphs—"paragraphing for appearance." Many of the letters in an office, though, are written by people who have had little such instruction. To increase the effectiveness of these long letters, many supervisors of transcription pools, therefore, actually set rather arbitrary limits for paragraph length. Some tell their transcribers to use ten lines as a maximum length; some suggest six or even five lines as the limit. Most lengthy paragraphs can be cut in one or more places. To many typists, the long paragraphs "look right" because letters and straight copy in the classroom have had long and complicated paragraphs.

*Simplified Technique No. 6.* To offset these experiences, teachers of transcription can encourage and give top credit for letters transcribed with accuracy and with eye-appealing short paragraphs.

The students who have always transcribed from notes where paragraphs were faithfully dictated are in for a real shock when they must work without such helps. Some experience, too, is needed with dictation with only part of the punctuation and only a part of the paragraphs indicated.

# 8. Information Economics

**IRENE PLACE,** Portland State College, Portland, Oregon

> Information economics . . . concentrates on the allocation of resources for the storage of knowledge, for obtaining of information through data processing, and for the effective utilization of both stored knowledge and processed information by individuals in the firm.[1]

Information processing is the function of the office. To gather, organize, integrate, manipulate, store, and retrieve information is the purpose of the office in any organized group of business, government, education, social work, science, research, or even religion. Where people work together, information is a ubiquitous commodity. It permeates throughout a group, binds everything together, and keeps the wheels oiled.

Raw information is bits and pieces of data—single facts—that come from many sources inside and outside the group. For example, in business they result from cash sales, calls made by repair men, shipping room activities, production line schedules, petty cash accounts, and so forth. Each situation generates bits of information that add to the total accumulated (and needed?) by a group. As the bits flow in from their various points of origin, they must be processed: batched, sequenced, organized, and merged before reports can be produced from them. For example in business, production information must be merged with payroll information, purchasing information with inventory information, sales with production. Information within a group is useful somewhat in ratio to how well it has been organized, integrated, processed, and distilled. Information only partially distilled, after-the-fact, or containing errors is hard for managers to use and affects the efficiency of their performance within the firm. It affects them like poorly processed food. In other words, the more highly organized and distilled information is, the more useful it is likely to be. Value is added to information when it is properly processed because it helps managers (a) make better decisions; (b) make decisions faster; (c) make decisions by analysis rather than hunch; (d) make decisions they otherwise would not be qualified to make; (e) assess the scope of projects for which they are responsible.

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[1] McDonough, Adrian M. *Information Economics and Management Systems.* New York: McGraw-Hill Book Company, 1963.

### Information Utility

Information technology (now that the computer is available as a manipulative tool) is a new productivity frontier. In this decade, the battle to increase gross national productivity is moving from the factory to the office—to information processing and information utility. A focal point and goal in this computer age is to advance in business, government, science, and medicine through improved intellectual performance which can result from more effective data processing as well as through improved technological developments. We reason that more thoroughly processed information, now possible because of the unusual manipulative power of electronic computers, can improve man's intellectual performance. Information comes from accumulated bits of data; information supports knowledge and decisions; good knowledge supports wisdom.

We are not anywhere near the goal of satisfying the demand for knowledge required to organize and operate business and government at optimum levels or to develop new scientific frontiers. More skillful processing of information will lead, we believe, to increased efficiency on all fronts. It can, in fact, provide the margin of difference that will tip the scales between continued healthy economic growth and scientific development or disillusioned subsidizing.

In all areas of endeavor, man's improved intellectual performance through better information processing and utilization can help him arrive at new conceptual horizons. Already, even as we stand at merely the threshold of this new frontier (information technology), nearly 20 percent of the recent increase in gross national product is being attributed to education, better methods of regenerating and retrieving information, and better intellectual performance.

### Information as a Commodity

The latest thinking, then, is that information should be regarded as a commodity or resource, apart from papers, forms, and other physical carriers on which it is accumulated. The thought is that if this commodity, particularly in the raw-data state, is manipulated skillfully, residual information (the distillation) will be more meaningful and useful. With the fantastic speeds and bigger and bigger memory capacities of electronic computers utilized in on-line, real-time systems, the future of information technology is exciting. Information technology looks like a new opportunity for human progress.

### Education for Office Occupations

Once the significance of the above concepts is understood, it should become clear that the emphasis today in preparing young people for office jobs must shift from the purely mechanistic and operative to at least an awareness of the information commodity and utility point of view. Imagine training a musician to play the piano or fiddle without an awareness of the function music performs in society or training a carpenter to go through the motions of building a house without an awareness of the function of the completed dwelling. But, you say, that is different. You can hear music and see a home. You can also see and use information. For example, how a business uses its information determines to a large extent how it prospers in the economy.

The problem in office education, as this writer sees it, is one of emphasis and point of view. The traditional office training teacher puts too much emphasis on manipulative skills and trivia. The situation can be compared to concentrating on how to knead bread without considering grades of bread, ultimate utility, and customer satisfaction. We need a new emphasis (information utility) and a new point of view. So, let us face it. You and I, experienced office training teachers, are prejudiced and restricted in our thinking and teaching by yesterday's notions of what office work is. We have specific mental images of positions such as a duplicating machine operator, stenographer, bookkeeper, receptionist, file clerk, and the like, reflecting miscellaneous job experiences we had in pre-computer days and from which we enjoy drawing illustrations to tell students how things are (were) done in a real office. So we pass our yesterday-oriented emphases in office work on to tomorrow's employees.

### New Terminology and New Concept

One of the hardest tasks facing experienced office training teachers today is to update (change) established mental images of the office, its function, and its employees. Perhaps a first step in doing so is to realize that business education information acquired earlier has deteriorated. Information deterioration has happened in other fields as well as business education, for information is a perishable commodity. Deteriorating information must be supplanted and renovated. Even the context of typewriting and shorthand skill-building drills needs to be updated so that it is thought-provoking, motivating, and informational. For example, just as you previously asked students to collect materials about office machines, business letters, letterheads, or business forms, ask them now to gather "concepts" about such modern-day information terms as: information processing systems, automated data processing, information storage devices (computer and otherwise), systems analysis and design, work simplification information vs. communication, knowledge, and wisdom.

Do you see the possibilities in the foregoing terms? They suggest exciting and worthwhile thought areas which will in turn help produce office employees who are more alert to the importance and usefulness of information within a group, particularly within business and government. They will be aware of the need to try constantly to improve information processing systems and procedures as well as to consider the quality and use made of information they process. The concerted efforts of all employees are needed to simplify and maintain information pipelines in today's complex organizations. Every employee can contribute if it is only through an awareness of the importance of information in improving intellectual performance.

Material about information economics in business can be worked into all sorts of teaching situations similar to the way skillful office training teachers work in material about grooming, human relations, accuracy, dependability, and getting ahead on a job. It is, in this writer's opinion, a phase of knowledge that is absolutely essential to a well-balanced orientation to office jobs in today's enterprises—large or small. Try to add this new dimension to your office training courses.

# 9. Changing Patterns in Office Work

**ELEANOR MALICHE,** Michigan State University, East Lansing

With almost monotonous regularity business educators are reminded of the changes automation, and especially the demon computer, have wrought in the modern business office. They are alternately warned about the extinction of clerical work and consoled that clerical work will always be with us. This article is neither for nor against automation, computers, or clerical work. Its aim is merely to examine occupational statistics in light of today's technological developments so that we might get a picture of changing patterns for business education.

### Increasing Office Technology

When the computer appeared on the scene a scant 20 years ago, its use beyond scientific applications was not envisioned. Knowledgeable seers prophesied that in the United States only 10 or 12 computers were all that would ever be required to handle all calculations amenable to computer methods. In the less than 15 years in which computers have been adapted to business use, over 26,000 computers have been installed in the United States alone and the annual growth rate is about 20 percent.

### Shift from Blue-Collar to White-Collar

With this unrelenting acceleration of what is now recognized to be part of a full-scale technological revolution, changes are occurring also in the composition of the work force. As automation permeates business and industry, we find, for example, that increasingly blue-collar jobs (manual laborers, operatives, craftsmen) are being upgraded to white-collar.

This shift toward white-collar jobs (professional, managerial, clerical, and sales workers) has been gaining momentum since the beginning of this century. White-collar workers first outnumbered the blue-collar in 1956 and will continue to do so in the predictable future. By 1975, the professional and technical workers, the most rapidly growing occupational group, will probably increase approximately to 12 million from 8.5 million in 1964, which will make it the second largest group of white-collar workers.

The third largest group is the proprietor-manager group, whose projected growth is from just over 7 million in 1964 to about 9.5 million in 1975.

The smallest of the white-collar occupations, the sales workers, who numbered about 4.5 million in 1964, is expected to increase to nearly 6 million in 1975.

The largest white-collar occupation is still the clerical group. Numbering over 12 million today, it is expected that this group will grow to over 14 million by 1975. This growth in the number of clerical workers will be due to several factors:

1. Increase in population; 211,430,000 in 1970, with a work force of 85,990,000; 230,415,000 in 1975 with a work force numbering 93,646,000.
2. The shifting of changing structures of blue-collar jobs and retail jobs to a clerical classification; that is, with the growth of more retail self-service stores, many sales workers move into cashiering and thereby are reclassified as clerical workers.
3. The continually expanding technological advancements.
4. The growing size and complexity of business enterprises.
5. The continually increasing volume of paperwork necessitated by the increased need for recordkeeping and communications.

Although the actual number of clerical workers is increasing, their percentage of the total work force is remaining almost the same. In 1965, clerical workers made up almost 14 percent of the total number of people employed; in 1970, the percentage is expected to be about the same; and in 1975, to rise to about 15 percent. It would appear that this occupational group is reaching a growth plateau in this era of technological improvements. As the more dramatic advances in data processing are perfected and applied, we will probably see a shifting in job structures within the clerical group, as well as a shifting to other occupational groups. It is still too early to gauge the full impact of electronic data processing on office work.

A closer look at the clerical work force discloses several interesting characteristics in the changing composition of the clerical group.

*Females Predominate.* Females outnumber the male clerical workers by more than two to one; this ratio is increasingly in favor of the females at each census count. The total female clerical work force increased 47

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NOTE: All figures have been derived from the projections of the population and of the labor force by the Bureau of Census and the Bureau of Labor Statistics.

percent in the 10-year period from 1950 to 1960, or an average increase of 4.7 percent a year, and 18.6 percent in the 5-year period from 1960 to 1965, or an average increase of 3.7 percent a year. The total male clerical work force increased 14.6 percent from 1950 to 1960, or 1.5 percent a year, and 4.3 percent from 1960 to 1965 or .8 percent a year.

*Clerical Positions Employing Most Persons.* We find that one of every three clerical workers is a typist, stenographer, or secretary and that one in nine is a bookkeeper. During the 10-year period from 1950 to 1960, we find that the number of male bookkeepers decreased, but the number of female bookkeepers increased about a third. The number of female office machine operators and cashiers doubled, and typists increased by half again as much. An interesting development is the striking difference in the numbers of secretaries and stenographers reported in these two years. Whether these figures represent a true difference or merely an "upgrading of job title" for status purposes is open to question.

*"Aging" Clerical Group.* The office work force is growing older. Over one-half of the men are over 38 years of age, and over one-half of the women are over 36 years of age. The median age of the male worker increased just under two years from 36.4 in 1950 to 38.0 in 1960; the female median age increased more than six years from 29.7 in 1950 to 36.0 in 1960. Of the several factors operating to cause such increases, perhaps the one most significant for the increase in age of the male clerical worker is that as fewer young males enter this occupational field, the average age goes up. For the females, we see several forces at work. Many women return to the labor force as their responsibilities at home lessen; their children reach school age or leave home; labor-saving appliances and prepackaged foods release time. Among many other factors are more households with second cars which facilitate commuting to a job; growth of suburban business centers opening up business opportunities; and the need for a second income in the home.

Today over one-fourth of the employed women are over 45 years of age. By 1970 almost 50 percent of all women aged 35-65 will be at paid employment. When we consider all workers, both male and female, we find that it is estimated that workers 45 years and over will make up over 40 percent of the anticipated increase in the labor force in 1970. (Young workers under 25 will account for over one-half of the anticipated rise).

### Implications for Business Education

What are the implications for business education of these changes in the size and composition of the clerical work force? Labor statistics show that technology's effect on the labor force is to invert demand patterns—increasingly the demand is for workers with high levels of skills and education and less and less for workers with little training. As computers and computerized systems are improved, more and more tasks will be automated. Not only the routine, repetitive tasks will be eliminated, but also functions of a higher order. Even today, in its crude fashion, the computer is making many decisions formerly made by supervisory and middle management personnel. As computer usage is improved, it will take over even more of this decision-making function, reserving only the most sophisticated "thinking" for the educated human mind.

Some offices will be automated to a greater extent than others, and office jobs of all levels will exist. However, the competition for those jobs requiring little skill will be fierce. Entry jobs for young persons with limited training and education will remain scarce. Competition will be keener for several reasons: more students will present high school diplomas (70 percent of our young new workers will be at least high school graduates, whereas only 60 percent were during the 1950's); new workers will be competing for jobs with older experienced workers who are returning to the work force, and with young men and women with college training; fewer clerical jobs not requiring specialized skills will be available. In fact, it can be said that those new job opportunities requiring the least education and training will show the smallest employment gains.

To help students obtain an education for a lifetime of work, and especially to help them through initial years of employment, is a challenge to every business educator. Even as we provide opportunities for them to acquire the skills they will need for their initial jobs, we must provide a broad background to carry them beyond those jobs.

Each course we teach should be an educational experience, not just a skill-training course. Each day's lesson should provide additional steps toward a better understanding of business organization and economics. Systems and work simplification concepts should be developed day by day and related to the processing of data. Students must be taught and reminded frequently that they are not handling a single paper, unrelated to anything else in a business organization, but that the paper they are processing is a vital piece of information, important to the over-all goal accomplishments of the business. For a student to know mechanical techniques is necessary but insufficient. He must know when these techniques are required and how to make a proper selection. This selection requires knowledge of comparative results and costs (including personnel time).

In a business machines course, for example, it is of greater importance that a student know what he is doing, why he needs to do it, and what the ultimate disposition of the product will be than to be able to total a column of figures within a required period of time. When he must make a copy, he should know when to copy manually and when to use a machine, what machine will do the job best, what the ultimate copy will look like, why one type of copy might be preferred to another, and what the relative costs are in terms of materials and labor.

We must help our students to develop initiative and judgmental prowess with a feeling of responsibility for their work. Following through on job assignments, even on as simple a task as a telephone message, is important to learn. Computers are capable of great speed but may not be able to detect judgment errors in their input. Therefore, the accurate completion of a task by humans may be more important than speed.

Change is so rapid and so frequent today that our students need to learn the values of personal flexibility and of continuing education. In the years to come, very few persons will go through to retirement without the need for retraining.

Business education can serve best by imparting to students not only the entry skills required to get and hold a job, but also the general education and attitudes to permit them to succeed on the job and to continue to learn. Focusing on these general objectives is a necessary prerequisite to the thorough reappraisal of business education which seems to be required by the changing occupational patterns.

TYPEWRITING

## 10. Typewriting—Office Assignment Number One

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Operating a typewriter is an activity common to practically all general office jobs. It is the one skill which office executives agree cannot be learned wholly during employment.

For initial employment in general office work, business firms ordinarily require (1) high school graduation, (2) no pre-employment technical training, (3) no competency at the acquaintance level, and (4) no competency at a specified level of proficiency. This is not true of employment in jobs involving the skill of typewriting. Such jobs require pre-employment technical training with competency at a specified level, that is, greater than an acquaintance level. The specified level of competency is usually a skill level. In other words, the employee must indicate that he can perform the activity involved without supervision or assistance.

Office executives anticipate that with office procedures changing through the influence of mechanization and automation there will be an upgrading of technical qualifications for general office personnel, especially in the area of the typewriting skills. Very few business firms, however, provide in-service classes of a formal nature in the area of typewriting. "Over-the-shoulder" instruction is provided by supervisors and fellow workers, but this instruction is basically concerned with procedures peculiar to the firm. Since little training in the techniques of typewriting is given on the job, such skills need to be obtained prior to employment. The typewriting assignments given to general office employees should be the basis for such pre-employment training.

### Duties and Qualifications of a Typist

Although typewriting activities are involved to some extent within the majority of general office jobs held by high school graduates, most typing activities are performed by those persons classified as either junior or senior typists. Typewriting duties within these jobs range from simple, straight-copy typewriting to the operation of fairly complex typewriters in the preparing of masters for forms and other printed materials.

*The Junior Typist.* The duties involved within the job of junior typist may be divided into two parts: regular duties and irregular duties. The duties designated as regular are those activities which are the core activities of the job. These core activities are to:

... Type in duplicate or carbon packs such prepared business papers as reports, memos, letters, charts, forms, form letters, labels, envelope addresses, bills, index cards, articles, notices as required on a straight-copy basis from printed or written material or corrected copy of average difficulty, requiring little or no planning for setup and arrangement

... Proofread work by checking and comparing for completeness, correctness, visual appearance, making necessary corrections

... Collate work when completed if necessary
... Post and maintain records of a simple nature
... File correspondence, reports, records, et cetera, as required, according to an established system where categories are clearly indicated and to furnish such material to authorized personnel upon request
... Copy or transfer data from one record to another where information to be transferred (or copied) is clearly indicated
... Obtain information from established sources for standard forms, reports, making simple mathematical computations where necessary (comparing and verifying for completeness and accuracy) either manually or by using an adding or calculating machine
... Prepare materials for distribution or mailing where procedures are established
... Maintain typewriter in working condition: change ribbons, clean, and oil machine when necessary
... Keep work area clean and orderly.

The duties of the junior typist which are designated as irregular are those activities which are closely related to the job but are not actually essential to the performance of the job. The irregular job duties of the junior typist may include the following:

... Typing routine letters, memos of a limited variety and scope from telephone recorders and other mechanical recording equipment
... Sorting and distributing of mail
... Cutting masters of a simple nature and the operating of the duplicating machine
... Typing simple, statistical material
... Answering of routine telephone inquiries directly related to the job
... Performing errands within the firm as directed
... Performing related clerical duties of an equal or lower classification as directed.

The educational and personal qualifications for the junior typist include high school graduation or the equivalent, including instruction in general office procedures such as sorting, checking, and filing; arithmetic; grammar, spelling, punctuation; handwriting; and typewriting. He must be physically and mentally qualified to maintain a pleasant and tactful manner; to follow simple oral or written instructions; to learn to operate the less complicated transcribing, calculating, and duplicating machines; to work under pressure; and to maintain mental and visual attention coordinated with manual dexterity.

In-service training requirements for a junior typist are from one to three months of training on the job for adequate performance, with six months for attaining normal proficiency.

Job specifications for the junior typist indicate that the duties are of a routine general office nature including such activities as sorting and checking which involve the application of clearly prescribed procedures. The duties require judgment in copying and preparing materials in accordance with written or oral instructions; there must be accuracy in typewriting and proofreading. The work of the junior typist is under general direction where non-routine matters are referred to the supervisor for decisions; the work is mostly self-checked.

Any errors made by the junior typist are detected when the material is put to use; such errors would require minor clerical effort in correcting and would cause minor confusion and loss of time; undetected errors may impair employee-employer relations as well as good public relations. Very little work is done with confidential data; the effect of any disclosure probably would be negligible. The junior typist has daily contacts with his immediate associates and supervisor while furnishing or obtaining information, occasional contacts interdepartmentally to obtain and relay routine information, and occasional public contacts via the telephone to answer routine inquiries.

The working conditions of the junior typist include the normal distractions; the work is repetitive, the majority of which is done while seated. The work is performed within the usual office surroundings.

*The Senior Typist.* The job of the senior typist varies little from that of the junior typist in basic qualifications, the major difference being the need for the ability to lay out and arrange work. However, the duties are more complex than those of the junior typist. The regular duties for this job are to:

... Prepare and type regular and special reports, obtaining and combining information from incoming or filed materials
... Type self-composed letters on routine matters
... Type varied material (letters, reports, tabulations, charts, statistical material, bills of lading, invoices) of any degree of difficulty (including technical terminology and unusual terms) from either clean copy or longhand or typed rough drafts
... Correct errors in spelling, grammar, and punctuation found on rough drafts
... Plan setup and arrangement for typing complicated tables, reports, and other material from very rough and involved drafts
... Proofread work, usually with another person, to insure accuracy
... Separate, collate, and staple duplicate copies (may distribute materials)
... File materials which refer specifically to one area of work or type of letters, reports, tabulations, et cetera
... Maintain typewriter in working condition; change ribbon, clean, and oil machine when necessary
... Keep work area clean and orderly.

Irregular duties of the senior typist include the following:

... Cutting stencils, ditto, offset, or other masters (may operate the required duplicating machine)
... Handling telephone inquiries, furnishing or obtaining routine information
... Opening and sorting mail
... Operating an adding machine, making calculations of a simple nature, comparisons, and verifications to determine completeness and accuracy of information
... Operating various copying machines such as Thermofax, Xerox, or photostat equipment
... Typing forms, reports, and material to be reproduced by offset printing processes
... Typing letters and memos from mechanical recording equipment
... Performing related clerical duties of equal or lower classification as directed
... Operating automatic typewriters such as the Royaltyper.

The working conditions of the senior typist involve some handling of materials such as ditto and mimeograph work which entails more exposure to equipment noise than would be true for the junior typist.

### Typewriting: The Key Skill

It is clear that typewriting is the key skill for general office workers. It is a skill used in almost all of the general office jobs open to high school graduates. It is the one skill which has not as yet been fully automated; that is, people are still needed to operate typewriters. Good typists will find jobs in the new offices—their skills are needed. Teachers of prospective general office employees whose assignments involve typewriting need to realize the necessity of skill training in typewriting and the need for more emphasis on accuracy. The future outlook for jobs involving typewriting is good. The jobs are there—but are the skilled typists being prepared?

## 11. For What Are We Training Typewriting Students?

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During the past few years, business educators have been somewhat bewildered by the impact of a new *bête noire*—automation. Confronted with this rather perplexing phenomenon in the "space age," business teachers have been reminded of the need for appraising their work in the typewriting classroom. Accepting the responsibility of helping to train the nation's typists in an age of advancing technology inherently obligates typewriting instructors to prepare students as realistically and as efficiently as possible for those tasks encountered in a dynamic and technical world of business. For those willing to meet and exploit the challenge of an automated business world, there are real opportunities for excellent teaching in the area of typewriting.

Although great strides have been made in teaching and measuring typewriting skill, too many typewriting instructors erroneously philosophize that the sole criterion for a typist is mastery of the letter keyboard. The typist of today, however, is being confronted with an increasing amount of technical copy of which numbers and statistics are an important and essential part. The massive presentation of data facilitated through modern electronic data processing equipment has created an intensive need for speed and accuracy in number typewriting. A noteworthy upsurge in the use of tabulated statistical reports has been effected by the increasing size and complexity of business firms, the emphasis on research, and the necessity of records for managerial and governmental purposes.

Unfortunately, business is faced with a scarcity of good statistical typists. Most typists, in fact, dislike number typewriting and attempt to avoid it whenever possible. One eminent educator attributes this top-row aversion to, and limited skill in, typewriting numbers to a combination of inadequate training and insufficient experience. Since many instructors also lack number-typing skill, they tend to seek refuge in the fallacious point of view that letter-keyboard mastery is sufficient typewriting skill to develop. Instructors who knowingly or inadvertently permit a typewriting student to view the top row either disdainfully or apologetically are imposing a serious handicap on that student and should seriously reappraise their course objectives.

Achievement of a reasonable degree of proficiency in typewriting numbers should be a major objective of typewriting courses purporting to develop a marketable skill; and intensive instruction on the top row should be an integral part of each course. Too often the top row is presented in the initial stages of instruction and then silhouetted throughout the remainder of the typewriting program. At least a few minutes each day should be used for purposeful drills using, for example, paragraph copy containing a generous amount of numbers or copy consisting of alternating columns of words and number groups.

Acute awareness of the extreme accuracy imperative to skill in typewriting numbers should be implanted in every student. Key-stroking ability alone, particularly when numbers are involved, is not sufficient; but figure-typewriting power must be combined with skillful proofreading and efficient error-correction techniques. Moreover, the art of detecting and correcting errors when they occur should be mastered by all advanced students.

Until a few years ago, typewriting instructors and their students were concerned primarily with the ability of the typist to copy simple printed material from context. With relatively few straight-copy jobs existing in today's business offices, not the basic key-stroking skill but the application of that skill to quantities of typewriting problems is gradually becoming recognized as one of the major factors in vocational competence. The typist must be prepared to perform all of the related activities involved in setting up and typewriting a problem according to specified directions: that is, calculating placement, making machine adjustments, performing various machine operations, preparing carbon copies, proofreading and correcting errors. Consuming an appreciable amount of production time, these "non-typewriting" activities have a direct impact on production quotas and very legitimately should be included in production measurement.

Those parts of problems which involve more than stroking the keys should be isolated for repetitive practice. The student should be taught the most economical methods of performing calculations for proper placement. To reduce waste time and motion, he should learn proper and efficient use of machine controls. In problems such as tabulation, a routine procedure should be established for performing the sequential mental and mechanical processes.

Since the ability of the typist to produce key strokes is questioned as a valid indicator of his ability to apply that stroke-producing skill, the trend in recent years has been an attempt toward measuring production output. One should logically expect production tests reflecting more than mere key stroking to yield lower words-a-minute scores than do straight-copy tests. Yet, for some instructors the scoring of production tests seems to result in self-abasement. They fear, too, a demoralizing effect of the "low" words-a-minute rate on the student. To avoid startling students with the great gap in performance between straight-copy rates and production scores, a new scoring method has recently been introduced. This method raises production rates to levels approaching straight-copy-rate levels by awarding additional words for "selected" operations (tabulating, underlining, centering, etc.) even though typists may perform these operations in a variety of different ways. The result of such measurement presents an inflated picture of the typist's true performance ability, for such nontypewriting activities are a natural part of true office typewriting.

Because competence in nontypewriting activities permits more time for key-stroking, improvement (or lack of it) in machine operations and problem-solving ability is automatically reflected in the production words-a-minute rate. Conversely, key-stroking ability is inaccurately portrayed when credit is given for activities requiring no key-stroking skill. Increasing a typist's words-a-minute score by giving additional credit for such activities does not increase his efficiency and problem-solving ability or render him more competent.

The basic objective for all typewriting students in an age of automation is opportunity—opportunity both to master the entire keyboard and to build useful, essential skill in machine operations as well as problem-solving ability demanded in business communications. Typewriting teachers should be diligent in their efforts to help students attain this worthy objective.

## 12. Teach More of Less in Typewriting

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Norwalk, Connecticut

Let's take a quick inventory of the number of "actual" typewriting hours in the typical two-year typewriting course—the figures may be surprising to some teachers. There are something like 300 instruction periods, more or less, in the typical two-year typewriting course. While each period may comprise 40-45 minutes, the students may be actually striking keys in only about 20 minutes of each period. Otherwise, they are listening to, or reading, instructions or explanations, handling papers, proofreading or checking typewriting, getting ready to typewrite and so on.

If this sounds like an exaggeration, use a stop watch to time your students or those of your fellow typewriting teachers. Start the watch when students write; stop the watch when students stop typewriting (just like they do in a football game). You will probably find that the average teacher has to "push" to keep students typewriting one solid minute out of every two, or 20 minutes out of a 40-minute period. The contributor has witnessed classes where the students typed 8 minutes out of a full instruction period!

### Limited Time

If students attend 300 typewriting periods, and actually strike keys an average of 20 minutes in each period, they are typewriting just about 100 clock hours (60-minute hours) in the two-year typewriting course. Many of us are inclined to believe that the time available for instruction in a two-year course is practically limitless.

Obviously, with the students actually working at the typewriter for only 100 hours, we cannot hope to equip them with a commercially acceptable typewriting skill—60 words a minute with accuracy—and also make them proficient in the multitude of unusual typewriting applications generally found in most textbooks. Something has to give way. Unfortunately, it is usually the necessary 60 WAM typewriting skill that gives way in favor of the many time-consuming, less useful, special typewriting applications. This is unfortunate because the former is an essential that has value in every office. The latter are special adaptations that vary with every office and that must be learned (and are expected to be learned) right on the job: legal forms, unusual letter setups, bills of lading, boxed tabulations, proxies, purchase orders, and a hundred other such specialized applications. It is no trick for a "good," 60 WAM typist to learn to do any of these on the job, if a job does call for a specialized application. Why learn a hundred of these specialized applications that may never be used, at the expense of the very necessary high speed with accuracy?

### Essential Operations

The contributor has been fortunate in having had the unusual opportunity to study the typewriting operations in hundreds of business and government offices, as a typewriting consultant. He can give assurance there are thousands and thousands of special typewriting applications: blueprint legends, insurance policies, address stencils, savings bonds, bank certificates, manifests, weather reports, and so on. The businessman can (and expects to) teach these right on the job—but he cannot build speed and accuracy!

What, then, are the most valuable things we can teach during the typewriting course that are needed and are useful in practically every office?

1. High speed with accuracy—60 words a minute
2. Skill in typewriting letters in the two common letter styles
3. Skill in other common typewriting applications—retyping rough drafts, addressing, centering, simple layout or arrangement, simple tabulations

With proficiency in these items, a typist can easily adapt to any job—regardless of what specialized, unusual applications exist in the particular business in question. How should we budget the total course time?

*Speed and Accuracy.* Devote whatever portion of the total course time is necessary to attain 60 words a minute with accuracy. A minimum of one-third of the total course time should be devoted to speed and accuracy building—but if more time is necessary, stay with it. This must be the first goal. If something has to give way, make it tabulations and layouts!

*Letters.* This is the most common application of typewriting. If possible, spend one-third of the course time setting up many letters: short, medium-length, long, and some two-page letters—but mostly short and medium-length letters. Teach the students to set letters up attractively almost as fast as they can typewrite straight copy with accuracy. Use just block and semiblock letter styles—they account for more than 90 percent of all letters in business. Do not confuse students with additional, rarely used styles to which they can adapt in one day on the job, if necessary.

*Rough Drafts.* Almost every executive sends reports to his superiors, or makes proposals, or sends out bulletins to branch offices or to salesmen, or creates copy for publication. This type of important writing is usually edited and re-edited. Like correspondence, retyping of rough draft copy is a part of every day's job.

*Addresses.* Another common application is typewriting addresses, used in letters, on envelopes, on labels, on 5 x 3 card files, in lists and directories. Several dozen to several hundred addresses are typed daily on the job. Increase job efficiency by building skill in addressing. As a learning exercise, addressing is invaluable as a review of numbers, capitalization, and speedy carriage returns. Time students—setting a goal of so many addresses a minute, depending upon their learning stage.

*Centering, Layouts, Tabulation.* Centering of headings occurs in nearly every type of report, manuscript for publication, and often in letters. There are occasions in every type of business when it is necessary to lay out copy on the typewriter to approximate how it will look when duplicated or printed. And there are a few occasions, too, when a typist may be called upon to tabulate some statistics. Teach the principle of tabulation—using many simple tabulations. Complicated tabulations are a specialty and are expected to be learned on the job—occurring perhaps in one typewriting job among hundreds.

Specialized typewriting applications which, of course, do not fall into the above categories have no business in the typewriting classroom. They do not teach anything, because they are different on every job (if encountered at all) and must be completely relearned on the job. The greatest loss is that these specialized applications take time away from the essential learnings that are useful and are needed in every job. The contributor's advice to the typewriting teacher is to reduce the instructional paraphernalia to the basic and simple essentials, and teach these thoroughly. In other words, teach more of less in typewriting!

## SHORTHAND

# 13. A Teaching Plan for Shorthand II

**KATHLEEN H. CASAD,** Ontario High School, Ontario, Ohio

Here is a flexible and simple plan which requires a minimum of change in your present lesson plans. It not only meets with the enthusiastic approval of the students but rewards the teacher with a sense of achievement.

The essential elements of teaching Shorthand II are simple. They are three: practice in taking dictation, production of mailable letters, and evaluation. The almost uniform pattern which prevails consists of one semester of skill-building dictation and one semester of transcription. The reason why so many Shorthand II classes are similar is not that anyone compels them to be alike, but because the setup of the textbooks makes it easy. Also, most articles written on Shorthand II or Transcription stay within this same general pattern.

If we analyze the usual pattern, some disadvantages emerge. A full semester of daily dictation practice tends to become wearisome to students, and may lead to a decrease rather than an increase in skill. During the transcription semester, there is a loss in speed in dictation because the emphasis is on mailability of letters transcribed. If skill-building is delayed until the second semester and transcription given the first semester, students often do not have the opportunity to produce mailable work prior to that first office job.

We have formulated a plan which permits the student to develop and maintain his dictation skills while producing mailable letters. Under this plan, the student quickly perceives the relationship between ability to take dictation and transcription of letters acceptable to an employer.

*How the Plan Works.* To use this plan, a teacher does not have to discard his present lesson plans, textbooks, teaching methods, or grading system. The school year is divided into six-week periods alternating between skill building and transcription. Other divisions such as the nine-week period could be used. The first, third, and fifth six-week periods are skill-building cycles; the second, fourth, and sixth periods are transcription cycles. After the first transcription cycle, the students welcome the opportunity to rebuild or increase their dictation rate.

*Skillbuilding.* It is assumed the students will be "rusty" in dictation skills after the summer vacation period; therefore, the first cycle begins with skill-building dictation. During the first four days of each week varying methods of dictation are used to stimulate and motivate the students to build higher speeds. Tests to measure achievement are given each Friday.

Since the ability to take dictation at a high rate of speed does not in itself guarantee success as a stenographer, part of each class period consists of drills in spelling, punctuation, word usage, timed writings from shorthand notes, and pretranscription pointers. This pattern is essentially the same for the other skill-building cycles except the standards for dictation speeds are increased.

*Transcription.* The second six-week period (first transcription cycle) is a gradual introduction of the techniques of typewritten transcription. The steps in this introductory phase include transcription of familiar plate material; self-written notes from homework, dictation from homework material, and dictation of new material related to the homework assignment. Mailability of letters is not stressed during the early period.

The emphasis during the second cycle (fourth six-week period) is one of producing an attractive, mailable letter. Mailable implies a letter free of typographical, contextual, grammatical, or spelling errors. It must be a letter which can be signed and mailed without retyping. The requirement of a mailable letter will invoke criticism from some teachers who will insist that this is testing, not teaching. When is a student to learn to accept responsibility for a mailable letter—in school or on the job? The employer simply cannot afford to have his letters done over time and again. Now is the time for students to think in terms of the employer's viewpoint, to accept responsibility for neatness, efficient work habits, a correct letter in all details, and to develop an on-the-job attitude. The goal of the student should be defined in terms of success on the job, and not the immediate goal of a letter grade for a completed assignment.

The final transcription cycle, which is also the last six weeks of the year, culminates in realistic stenographic tasks. Seldom does a stenographer take a few minutes of dictation at a predetermined rate to sit down to a typewriter and transcribe those notes undisturbed by interruptions. Nor does the average stenographer type only short- to medium-length letters on plain paper with no carbons nor envelopes. To prepare students for on-the-job situations, they use letterheads, make multiple carbons, type blind carbon notations, and prepare envelopes. By furnishing their own materials, the students become aware of the cost and waste factors involved in making mistakes.

Most of the dictation during the final cycle is office style with periods of sustained dictation lasting up to one hour with pauses only for dictator's corrections and substitutions. A certain amount of dictation is given while engaging in distracting mannerisms such as chewing on pencils, walking about the room, and the like. Timers to simulate telephones are set to ring while students are transcribing. Every effort is made to give the students as many realistic experiences as possible.

Experience in taking and transcribing notes for two-page letters, speeches, office bulletins, manuscripts, letters with attention and subject lines is an integral part of the final cycle. The letter styles are varied so the student does not become habituated to one style.

*Evaluation.* As previously mentioned, no teacher need change his particular grading system. For the skill-building cycles, our grades are based primarily on the student's ability to attain the speed goals set with a high degree of accuracy of transcripts. We prefer to use 98 to 100 percent accuracy instead of the more common 95 percent. If the highest goal for a period is set at 100 words a minute, then it must be passed with 98 percent accuracy, and 90 words a minute must then be passed at 100 percent. The goals will change from year to year depending upon the average ability of the class. At no time are goals set too low as an accommodation to the class. In Shorthand II it is assumed that most of the individuals are job material. Therefore, they should be expected to meet reasonably high standards.

Contrary to many pedagogical theories regarding theory and brief form tests, we require the students to pass a brief form test including derivatives with 100 percent accuracy and a theory test with 95 percent accuracy. There is no penalty for outlines which deviate slightly from the ideal. The tests, which are given each six weeks, keep the students from backsliding to illegible outlines.

The final grade in each skill-building cycle consists of 50 percent for speed attainment, 30 percent for brief form and theory tests, and 20 percent on classroom recitation. Failure to complete homework assignments results in a lowered final grade.

The student is graded on improvement and growth during the first transcription cycle. The final two transcription periods are based entirely upon mailability. Since schools require some form of letter grade, weekly letter grades are given. This grade is determined by the percent of mailable letters completed during the week. Although students are permitted to correct or retype an unmailable letter (as it would have to be done on the job), it receives minimum credit.

To summarize briefly, skill building interspersed with transcription results in a meaningful whole to the student who sees his goal defined in terms of his long range objective—that of a well-paid stenographer.

## 14. Touch Shorthand and Transcription

**ROBERT J. RUEGG,** Stenograph, Skokie, Illinois

Transcription is the bringing together of many secretarial skills to produce an accurate, attractive transcript in a minimum length of time. Each of the varied skills contributing to the transcribing act, such as typewriting, shorthand writing and reading, spelling, punctuation, grammar, and the sense of artistic placement, is essential to the final product. A deficiency in any one of the skills involved greatly reduces the secretary's efficiency.

This discussion deals primarily with the writing and reading of touch shorthand, only two of the basic transcription skills. For purposes of exploring touch shorthand's place in transcription, it is assumed here that the students and secretaries are highly skilled and well qualified in all skills of transcription.

Transcription as a skill itself must be taught by the teacher as he helps students interweave each basic skill into the newly-developed skill of transcription. To help accomplish this goal, touch shorthand students complete simple transcription assignments beginning as early as the first week of instruction. They first use longhand to write English sentences from touch notes and are evaluated from the beginning for spelling and punctuation accuracy, as well as for the ability to read touch notes.

When the typewriter comes into use, the student begins by transcribing with a straight-copy format, without concern for business letter setup. The teacher assists each student in evaluating errors to determine whether an error resulted from the transfer of shorthand notes to English spelling, lapse in typing skill, lack of spelling or punctuation knowledge, or from a misunderstanding of word meaning. Straight copy transcription activities continue until the student reaches high accuracy and becomes accustomed to the mental gymnastics required when reading phonetically-written touch notes and responding instantly at the typewriter keyboard with the English reaction.

Once basic transcription skills are developed, students progress to simple letter formats and short letters; then to longer letters with carbon copies; and, finally, to all the transcribing activities required of the total thinking secretary.

## What Is Touch Shorthand?

Touch Shorthand involves the phonetic writing of dictated words through use of a small, light-weight, silent shorthand machine with a 22-key keyboard that operates without electricity. As one or more keys are depressed on the keyboard simultaneously, English letters print on the fan-folded steno-pad shorthand machine paper that moves around the platen from the paper-storage area beneath the machine. Following placement of printed notes on the tape, the paper moves on to the receiving tray at the back of the machine where it automatically refolds into a fan-fold form. The secretary reads back any portion of touch notes by picking up the proper number of paper folds from the tray. A pen, or pencil, is located on the machine so that the secretary may make handwritten notations on the paper tape while using the top surface of the machine as a writing deck.

In any shorthand system, transcription efficiency begins during dictation as the secretary performs a number of activities to save time and insure accuracy at the typewriter. The basic preparation by the touch shorthand secretary is in the writing of notes themselves, for she is able to record all the dictator's thoughts on paper tape in easy-to-read English letters. Notes are printed in an identical manner whether the secretary writes them while fresh at the beginning of the day, or at the end of hours of continuous dictation.

Well-trained touch shorthand secretaries have time during dictation to include punctuation marks in the notes as part of the normal writing activity. This is especially helpful during transcription.

Whenever the secretary writes an incorrect outline, or the dictator changes the last word, the secretary depresses the asterisk key one time (*), and follows by writing the correct word. Later, during transcription, it is very easy for the secretary to ignore the word before the single asterisk and to transcribe the word that follows.

When the dictator changes a sentence or a paragraph, the secretary depresses the asterisk key three times (***) and continues to write what the dictator has to say. She often includes the dictator's total instruction, such as, "Change that to read, etc." The signals are easily recognized later during transcription and require only a moment for the secretary to adjust and correct as directed.

While discussing use of the asterisk key, it is also well to note that two asterisks (**) are used to identify a paragraph.

When reading a letter back to the dictator from touch notes, the secretary may make minor changes by using her pencil, or red ball-point pen when available, to write notations in pencil touch shorthand directly on the paper tape. When a major change is indicated, such as a new paragraph, the secretary marks the touch notes at the point where the change is to be included with an "A" or a "1," quickly places the notes in the receiving tray, strokes three asterisks and the words "Insertion A" on the paper tape, and takes the new paragraph on the keyboard from the dictator.

Times do occur when the dictator includes the name or address of an individual or firm in his dictation that is unfamiliar to the secretary. At this point in taking dictation, the secretary leaves her phonetic writing patterns and proceeds to use letter-by-letter spelling to insure accurate and uninterrupted transcription.

During a late afternoon dictation session, the dictator may instruct the secretary to transcribe a particular letter for mailing that evening while the others may wait for transcription the following morning. When this occurs, or whenever a letter or telegram is to receive rush treatment, the secretary tears off the touch notes at the platen, removes the touch notes for the special letters from the tray, and sets the notes and other applicable materials aside for immediate handling after completion of the dictation session.

During dictation, each business letter is set apart on the tape by the secretary. Before beginning a new letter, she reaches the short distance to the back of the platen and pulls down a few inches of paper tape to create a blank space.

Should the dictator follow dictation of a letter with instructions directed specifically to the secretary, such as, "And be sure to remind me to call Bill Adams early next week," the secretary strokes three parentheses, writes the message indicated, and finishes with three parentheses. Parentheses are used to surround special instructions because they are so easily recognizable in the touch notes.

During breaks in the dictation, such as telephone calls, the secretary may mark out copy in her notes not to be transcribed, add punctuation marks not previously included, and perform other functions that aid the transcription process.

### Transcribing Touch Notes

The touch shorthand secretary usually uses a simple transcribing box to place her notes in an upright position for ease of reading. Each new section of paper tape is exposed with a quick flip of the hand with hardly a pause in the typing activity. Following transcription of each business letter, the used notes are moved to the rear of the transcribing box while bringing the notes for the next letter into reading position.

Whenever the secretary does not have a transcribing box available, she merely lays the touch notes flat on her desk and flips the folds in a manner similar to the turning of pages in a textbook.

Prior to transcribing each letter, the secretary quickly scans her touch notes looking for asterisk signals that tell of copy changes and corrections. At the same time, she is estimating the length of the business letter so that she may determine the starting position on the company's letterhead.

A length of paper tape is the distance from one fold in the paper to the next. A short business letter takes about 2 to 2½ lengths; medium letter from 3 to 5 lengths; and a long letter from 6 to 9 lengths of paper tape. A two-page letter is in the offing whenever more than 10 lengths of paper tape are to be transcribed.

Having quickly accomplished the determination of letter length and copy changes, the efficient secretary transcribes the letter with speed, accuracy, and continuity as she reads her printed English notes with ease. Secretaries find touch notes easily transcribable at any time; the same day, the next week, or months later.

In offices where a number of touch shorthand secretaries are employed, and in classrooms where instruction is in process, it is not uncommon or difficult for one person to take dictation and to then turn the notes over to another person for transcription.

Following transcription, secretaries follow company procedures regarding the disposition of touch notes. When the notes are saved for future reference, the secretary wraps together all notes for each day and clearly indicates the date on the outside. The notes are then stored in a desk drawer or file cabinet.

## BOOKKEEPING AND ACCOUNTING

# 15. Bookkeeping as Preparation for Employment

HARRY JASINSKI, Northern State College, Aberdeen, South Dakota

The primary objective of bookkeeping when it was first introduced into the high school curriculum was vocational in nature. Students enrolled in bookkeeping courses for the purpose of obtaining bookkeeping jobs following graduation from high school. Recently other objectives for high school bookkeeping have become apparent. Students seeking employment in other fields of business as well as those planning for self-employment take bookkeeping because they believe the knowledge will help them.

In addition to specific job entry positions in bookkeeping, employers when hiring high school graduates prefer the student with preparation in many business subjects. (An employer prefers to hire a typist or a receptionist who has shorthand, bookkeeping, and typewriting over the student with only typewriting.) Many employers indicate that the worker prepared in the other business subjects is a higher quality worker. The same holds true in the basic data processing operations (tab equipment). The keypunch operator or verifier operator with bookkeeping preparation is preferred to the student without bookkeeping knowledge, and this remains true in all areas of data processing. Therefore, we as business teachers can continue to offer and justify bookkeeping at the secondary level as preparation for employment.

Bookkeeping is used as preparation for advanced study in accounting. The vocational approach would supply the necessary understanding of the basic elements of bookkeeping for students who plan to study accounting.

Another bookkeeping objective that is appearing more frequently is that of personal or general education use. Some reasons for its growth in importance are (a) keeping income tax records at the federal and state levels; (b) investing in stocks and bonds requiring the consideration of statements from companies, stock dividends, debentures, fractional shares, and the like; (c) borrowing money from various lending institutions; (d) keeping records for clubs, lodges, and churches; (e) managing home and family affairs; and (f) recordkeeping for oneself as a farmer, professional man, or owner of a small business. Again, this objective may be accomplished by the vocational approach since it involves more than the simple budgeting taught in general business.

With these additional objectives claimed for studying bookkeeping, business teachers will need to revise their thinking in order to set up a course outline to provide for all students who are enrolled in bookkeeping. The problem of individual differences is apparent not only from the standpoint of ability but also from the standpoint of the student objectives in a one-year course in high school bookkeeping. The easy solution to this problem would be to have separate courses with each course placing emphasis on one specific objective. However, with the "squeeze" put on the high school curriculum in recent years, this is impossible; many teachers are trying to keep at least one bookkeeping course in the curriculum. All the objectives of bookkeeping may be taught in one course with the vocational objective as the primary one. The understanding of the bookkeeping cycle and terms taught in a course with the vocational objective will enable the student to use this knowledge for the secondary objectives as well.

That the vocational objective of bookkeeping is still important and justifiable is summarized by Perry and Wanous: "There is a tremendous and growing demand in business for persons who have competency in bookkeeping, coupled with practical business experience."[1]

High school students are still obtaining bookkeeping positions upon graduation. Tonne points out that "Whatever phases of bookkeeping are taught for vocational purposes should be completely redirected toward making these students competent ledger clerks and competent bookkeeping-machine operators rather than old-time bookkeepers."[2]

### Specific Accomplishments

Because of the varying abilities of students in bookkeeping classes and the different reasons students take bookkeeping, there are degrees of accomplishments in these classes. In all instances, regardless of students' abilities and reasons for enrolling in bookkeeping classes, it requires a great deal of motivation on the part of the teacher to hold the interest of the students. Teachers should not establish a goal of completing the book in 26 or 28 weeks. This might be accomplished by some students but not necessarily by all.

All students should stay together during the presentation of the bookkeeping cycle, which is covered in approximately the first 10 chapters in most high school bookkeeping textbooks. However, at the end of this period, only those students who have a thorough understanding of what has been presented should then proceed to the following chapters.

Many teachers bring their own troubles into the classroom by taking all students through the remaining chapters when there is a lack of real understanding in the first basic cycle presented. Students will continue to have trouble understanding bookkeeping if these first chapters are not thoroughly understood. It is at this point that the class should be divided into two groups. One group will continue with the next chapters, working together or individually at their own speeds and progressing as rapidly as possible. The other group will start from the beginning and review until understanding is achieved.

The 10 most important bookkeeping duties to guide the teacher in setting goals of achievement for his students as listed by Young are:

1. Preparation of customer statements
2. Accounts receivable analysis

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[1] Perry, R. S., and Wanous, S. J. "The Business Curriculum—What Is Its Future!" *National Business Education Quarterly* 27: 43-49; May 1959.

[2] Tonne, Herbert A. *Principles of Business Education.* New York: McGraw-Hill Book Company, Inc., 1961. p. 296.

3. Work with books of original entry
4. Credit investigations and collections
5. Accounts receivable posting
6. Sales analysis
7. Work with installment sales records
8. Collection of data for property tax
9. General ledger posting
10. Work with insurance records.[3]

To develop in his students the goals mentioned, the bookkeeping teacher must not be tied to a textbook, workbook, teacher's key, or handbook. He must prefer experimenting to working in a fixed pattern. He must know where his students are employed and what jobs they perform after graduation. Particularly he must enjoy teaching–specifically teaching bookkeeping–rather than regard his work perfunctorily as just another class or just a job to complete.

In order that his teaching extends beyond theory into practice, the bookkeeping teacher should do some bookkeeping work or have bookkeeping experience. He can enrich the learning process for his students by taking advantage of available community resources such as the local chapter of Administrative Management Society, guest speakers, field trips, business forms, part-time work experience, colleges in the community, and talks by former students.

Resources outside the local community such as the *National Business Entrance Tests* and material available from agencies of the government, national professional organizations, and publishing companies can provide him with additional information to aid his teaching. By making as much use as possible of audiovisual materials such as films, filmstrips, chalkboards, charts, income tax kits, posters, flannel boards, tape recorders, overhead projectors, and opaque projectors, the bookkeeping teacher can further supplement his instructional program.

The bookkeeping teacher should relate whatever he is teaching to real or local situations and understand the needs of all phases of bookkeeping. Finally, by subscribing to professional magazines and reading what others are doing and by attending professional meetings at the local, state, and national levels, the teacher of bookkeeping can be sure he is offering his students instruction in modern bookkeeping practices.

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[3] Young, John R. "A Study of Accounting Duties with Special Attention to Those Duties Emphasizing Bookkeeping or Accounting Functions." Doctor's thesis. Iowa City: State University of Iowa, 1954.

To obtain desired results in bookkeeping, the teacher may do the following:

1. Use more realistic material in the bookkeeping course
2. Teach about bookkeeping machines and their use
3. Procure valuable materials from business offices to supplement textbooks
4. Emphasize the types of records kept by small businesses
5. Introduce samples of commercial record systems
6. Study business papers in connection with analyzing transactions
7. Include simple procedures of analysis and comparison
8. Visit local offices to see how work is actually accomplished
9. Establish a work-experience program
10. Think in terms of the second and succeeding jobs in addition to the first job.

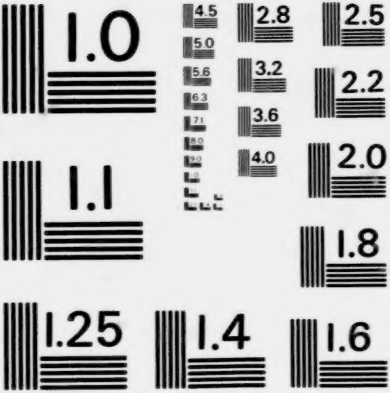
### Suggestions for Measuring and Evaluating Outcomes

To measure and evaluate the level of achievement with a bookkeeping class, the following methods may be effective:

*1. Spot Checking.* Exploratory and practice work may be spot checked by the teacher, by students who have completed assigned material, and by students checking their own work. By using this method a learning situation is maintained.

*2. Oral Discussion.* Before previewing a new phase of the cycle, use hypothetical situations or use a previous problem students have worked in class and inject the new situation or account to see if students can think through the process. For example, prior to introducing adjustments, ask what entries would be necessary if part of an insurance account were used.

*3. Achievement Tests.* Two types are common: (a) the short-answer test which includes true-false, multiple-choice, and completion or matching questions, and (b) the performance test. The first of these tests, however, never discloses how well a student can apply what he has learned to definite bookkeeping problems and situations. In the second type, or performance test, the teacher can check how well the student understands the bookkeeping cycle which involves analyzing the entry, journalizing, posting, ruling the accounts, balancing the accounts, adjusting entries, preparing the profit and loss statement and the balance sheet, and the closing and reversing entries. In the performance test any one of the above phases, combinations of them, or the complete cycle can be checked. Therefore, this type of test can be used at any stage in the bookkeeping course.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1.25
1.4
1.6

MICROCOPY RESOLUTION TEST CHART

NATIONAL BUREAU OF STANDARDS-1963-A

4. *Case Problem Tests.* Case problems can be used effectively to determine a student's understanding of bookkeeping principles and his ability to analyze situations. A disadvantage of this type of test is the subjective grading involved.

5. *Unit Tests.* Publishers of bookkeeping textbooks often provide excellent unit tests for classroom use.

6. *Practice Set Tests.* These tests should be of a nature that tests the student's thorough knowledge of the practice set.

7. *National Business Entrance Tests.* The bookkeeping test in the series of NBET consists of simulated office situations and requires two hours for completion. The *National Business Entrance Tests* are available from our own specialized professional association—the National Business Education Association, 1201 Sixteenth Street, N.W., Washington, D. C. 20036.

## 16. What Automotion Means for Bookkeeping

**ENOCH J. HAGA,** Livermore, California

There are at least three different contexts in which we may discuss the influence of automation on bookkeeping. The first is automation of the methods and materials for teaching the course itself, an area often overlooked. The second is the influence of automation on bookkeeping as a subject to be studied in secondary schools. The third is the influence of automation as a field of work.

Bookkeeping courses have the natural advantage of being preprogramed. The major publishers of business education textbooks have available for sale complete bookkeeping "educational packages" that represent the culmination of many years of hard developmental work and perfection. These "packages" include the basic textbook, subsidiary teacher's manuals and guides, student workbooks and practice sets, and materials for testing and measurement. Any reasonably careful and conscientious teacher, however inexperienced, can take these materials and by simply following directions achieve satisfactory results.

The usual way of using these materials is to have students work together as a class. Starting at the beginning of the book, the teacher explains principles and practices, assigns problems, goes over the problems in class, assigns practice sets, and, of course, follows some plan for continuing or periodic testing and measurement. This works well for a while, no matter what the conditions or experience of the teacher, but sooner or later the brighter students (or more diligent workers) forge ahead of their slower compatriots. Now the teacher faces his first crisis: to meet individual needs or to "stay with the group."

What he does depends upon who he is and where he is. If he is naturally capable or experienced, he may be able to conduct group class sessions as usual, all the time encouraging the slower students and challenging the faster ones. If he is not so talented, faster students may turn into bored antagonists and slower students may be reduced to the status of discouraged and disgruntled onlookers. Depending upon the composition of the class and the character of the teacher, what usually happens is something in between. Of course, if he is creative and imaginative, the teacher may strike out in search of new and unconventional techniques for helping his students to learn. He may begin to question the wisdom of having all students work together on the same material, cover the same lessons at the same time, do the same practice sets at the same time, and take the same tests on the same day. He may wisely decide to let the faster students work ahead, yet hold slower students to minimum standards. He may assign one practice set to one, two, three or more to another, or perhaps in special cases none at all. He will put the burden of learning where it belongs—on the student; yet he will accept his responsibility to get the best from each.

Still, he will not tolerate any compromise with minimum standards, for he knows that the student who cannot or will not meet them does not belong in the class. To cater to the incompetent, to offer something for everyone, is an educational philosophy that applied to bookkeeping can lead only to disaster. In bookkeeping, as in algebra (and probably many other subjects), marginal understanding is simply unacceptable.

Some students can finish a year's work in less than a single semester (at this point someone will ask, "What can I teach them then?" but this question deserves no reply), and no one should require more than the usual academic year. Indeed, the chief virtue of individualized instruction is that students can get more done in less time. When schools begin to reward students for work done instead of for time spent, they will have taken a big step in motivating students and in making individualized instruction more profitable. If a student completes one year of bookkeeping in one semester, he should get full credit for the work on his transcript.

I taught bookkeeping for over four years in admittedly unusual circumstances, using individualized instruction. I "fell into" the method when it was learned after a week or two that it was impossible to keep the class together. Switching to individual study techniques, I soon found that students like to be kept busy, like to work hard; it was not unusual for students to do in one semester what it took others a year to accomplish. Many begged to be given extra practice sets. Some went on to university correspondence courses in accounting where their self-discipline paid off in higher grades. A great deal about teaching was learned from this group [1]—most of all, I came to the conviction that regular class instruction, continuing and unvaried, is almost totally ineffective.

Group instruction, at its best, is a rarely effective phenomenon. At its worst, it is positively chaotic. The "educational packages" for bookkeeping instruction, on the other hand, constitute ready-made "teaching machines" that even the mediocre teacher can always use to get acceptable results.

Automation of bookkeeping instruction is primarily a matter of using existing materials in a new way. There are no extra costs, and the results can be spectacular, depending upon how much work you put into your teaching.

Once this first step has been taken and you find that intelligent experimentation can pay off, you are ready for higher things. Increased use of audiovisual aids is vital. More and more commercially prepared materials are becoming available. However, in many cases you'll have to prepare your own audiovisual material, either because it does not exist, is not locally available, or is not suitable for your purposes.

Teaching machines and computer-assisted instruction are definitely on the way. Having already been refined into "bite-size" steps, bookkeeping is amenable to both techniques. For the present, however, the best automation that you can provide will come from making better use of the materials we have, and from increased production and use of audiovisual aids. Paradoxically, automated instruction is virtually our only hope for making education more humane, more of a person-to-person affair. Just as computers can free us from the drudgery of rote calculations, from clerical work that would otherwise take lifetimes to complete, automation can free educators to really know their students. Most business subjects, including bookkeeping, are ripe for automated instructional methods; these methods are today technologically but not economically feasible. In the meantime, we must make do. Let us then turn to a discussion of the influence of automation as a subject to be studied in schools and as a field of work.

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[1] Haga, Enoch J. "Tentative Standards for Bookkeeping Achievement." *Journal of Correctional Education,* October 1959, p. 12.

### Bookkeeping as a Field of Work

Routine bookkeeping tasks were among the first to be automated, not only by means of punched card equipment and computers, but by office machines and systems of all kinds. The main effect of this continuing process of automation, which is not likely to be halted in the foreseeable future, has been a splintering of total or full-charge bookkeeping systems into various procedures, such as accounts receivable or payable, which can be handled rather mechanically by clerks having no detailed knowledge of the complete bookkeeping cycle. Although full-charge bookkeeping jobs may still be available, I suspect that the average high school business graduate would have a difficult time in securing one of these positions. Let us grant that it is remotely possible. What then?

Our high school graduate bookkeeper would probably begin to feel himself rather limited after he thoroughly learned his job and the routine became all too familiar. A girl might be content to hold the job until marriage, but a man would likely feel the need to advance. This implies further education and movement into a larger company. The bigger firm would undoubtedly make some use of automated systems and equipment, so the move would represent both a challenge and an opportunity. The upshot of it all is that more education is required, at least through junior college graduation, and very likely through senior level or even the graduate school for a professional accountant (public or private) or data processing specialist—and any accountant these days has to be something of a data processing specialist.

This turns us to the basic questions of "Who should take bookkeeping in high school? and why?" The answers are far more difficult than one might imagine.

Automated technology has descended like a veil over our society, clouding its future, but bringing great promise of sunny days ahead. Even in the balmy days of yesteryear, we could not identify or predict with any degree of certainty the vocational future of any particular student. And we cannot do it now! Yet, all of our high school business majors and areas of concentration are built on the faulty premise that we can.

The best advice that we have from the experts is to try to educate students for adaptability—to prepare them for change and lots of it—to harden our students to the realization that their futures are insecure and that they must be able to change job skins as painlessly and effortlessly as a chameleon.

Now, as always, the vocational and educational alternatives open to any student are enough to frighten any competent counselor. Students as early as the eighth or ninth grade are asked to start thinking about what they want to specialize in during their high school years. They are urged not to delay this vital decision, for admission to college may well depend upon whether or not they get good grades in the right subjects. Rightly or wrongly, they are even asked to fill out forms detailing the sequence of subjects that they propose to follow.

Somewhat paradoxically then, here is what automated data processing means to the student about to take bookkeeping (for whatever reason), who definitely knows (or thinks) that he is not going to college, at least not immediately. It means that he should not take bookkeeping at all unless he has had sufficient mathematics, English, science, and social studies to give him some concept of what he knows and what there is to know. This foundation is necessary for later adaptability, both vocationally and socially. A person who does not have the basic tools for learning cannot be easily trained or retrained for anything. But once a student has scheduled his basic education, if there is room, bookkeeping is as good or better than any other elective.

For the student who plans a business sequence in a junior or senior college, bookkeeping on the high school level is not essential. In college this student will repeat bookkeeping in his principles of accounting course.

This leads us to the surprising conclusion that bookkeeping is not an essential subject on the high school level. This does not mean, however, that no high school students should take bookkeeping, but it does mean that when we put the matter into perspective, bookkeeping is the "gravy," not the "meat" of the high school curriculum. A course in bookkeeping is not likely to prepare any student (even the girl who goes right to work after graduation) to be a bookkeeper. The course is useful for orientation and familiarization purposes. And that, I hasten to add, is reason enough to justify the course at the high school level. Few businesses keep books the way students are taught to keep them in bookkeeping, but it does not matter because the principles are the same no matter what specific system or procedures are followed—and it is the principles that the students can learn in school.

For those students who do take bookkeeping in high school, I recommend not more than one year; and this should be spent on basic manual principles and practices. During this year, the teacher should give his students some familiarity with automation by weaving into his instruction such material as presented in *Automation Office Practice*.[2] Time can easily be found for this material by tightening up the loose ends of the bookkeeping course. Most capable students, as I have mentioned, do not really need a full year to complete the course.

First-year bookkeeping should be followed by an intensive course in the principles of punched card data processing, which is the method often applied to routine bookkeeping tasks. Such a course will familiarize students with the fundamentals of the automated methods commonly applied to ordinary bookkeeping procedures. The few pages devoted to automation in today's popular bookkeeping textbooks—stuck in almost as an afterthought—are not adequate.

If, after one and one-half years of bookkeeping and data processing, a student has open time for additional electives, I would recommend a semester course in computer fundamentals. While to my knowledge no suitable textbook presently exists, the teacher who wants to design his own course will find ample material and outlines.

In summary, please remember that the growth of an automated technology implies that productive members of society should be first of all amenable to vocational change. This presumes a foundation of general education in basic areas and implies that specific training for permanent jobs is virtually impossible. Bookkeeping, then, may be a valuable elective course, but it is not essential in secondary schools, even for future bookkeepers. When it is taught, however, it should be taught effectively, preferably using the philosophy if not the tools of automated instruction. Bookkeeping instruction should further combine some introductory material concerning automation, and should be followed up with separate familiarization courses in principles of punched card data processing and computers. Bookkeeping and data processing are so interwoven in business that they cannot be separated.

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[2] Wanous, S. J., and Wanous, E. E. *Automation Office Practice*. Cincinnati: South-Western Publishing Company.

# 17. Enriching Bookkeeping Classes By Integrating Economics

**JESSE F. TEEL, JR.,** Topeka High School, Topeka, Kansas

Recently a University Professor of economics commented that most high school bookkeeping courses were merely "how-to-do-it" courses. The implication is that most of the emphasis is placed on the routine techniques of recording entries and preparing statements. Little or insufficient emphasis, he felt, is placed on developing concepts and understandings of the economic system of which the business enterprise is a part.

To those of us working and teaching in the area of business education, this is a startling remark. We may strongly wish to refute his allegation. We have long believed that bookkeeping is the one course in the secondary school's business education curriculum which presents to the student a broad, overall view of the business and economic system of our society. Even though few of our students actually become bookkeepers or accountants, we have felt that we can justify the course offering on the basis of the broad understanding of the business community which students acquire from the course.

But perhaps the allegation does have foundation. How many bookkeeping courses are simply "how-to-do-it" courses? How many teachers are still chained to the textbook with little or no enrichment instruction in the broader aspect of business and economics? Do we still evaluate our students' progress solely on the basis of the correct net income or net loss on the income statement or a balanced balance sheet?

During the past five years, undoubtedly many changes have occurred in the content of the bookkeeping curriculum. Numerous articles have appeared in business education publications urging the integration of economic concepts with bookkeeping instruction. A *Teachers Guide to Economics in the Business Education Curriculum* published jointly by the Joint Council on Economic Education and the National Business Education Association has an excellent chapter on this subject. Most bookkeeping teachers now are "economics conscious," and many have taken initial steps to reorganize their course content to include economic instruction.

However, little attention has been devoted to the evaluation of such instruction. How effective is the integration method? Are gains in economic understandings sufficiently large to be considered significant? How about bookkeeping achievement? Will students gain in economic understanding with a resulting loss in bookkeeping competence? How does a teacher "find time" to introduce pertinent economic topics? Where will he "streamline" his bookkeeping instruction?

## Experimental Study

The search for the answer, or partial answer, to these questions prompted the writer to conduct an experimental study with bookkeeping students at Topeka High School, Topeka, Kansas, during the 1964-1965 school year. Four classes of beginning bookkeeping were offered; two classes were designated as the experimental group and two classes as the control group. Twenty-five students were selected from each group and were paired or matched according to age, sex, year in school, IQ score, and percentile rank on the Differential Aptitude Test.

The two groups were taught in the same manner except that eight units of economics were taught in the experimental class. These units presented the basic economic concepts which economists and educators have concluded that everyone should know. Concepts of scarcity, economic systems, business organization, pricing, money and banking, measurement of economic output, and taxation were included in the units.

Two tests of economic understandings were used as pretests and final tests in each group. They were *A Test of Economic Understanding* by E. S. Wallace, made available by the Nebraska Council on Economic Education, and *Test of Economic Understanding,* published by Science Research Associates, Inc. All classes were given a battery of eight bookkeeping achievement tests made available by the South-Western Publishing Company.

The results were tabulated into organized data from which means, medians, and standard deviations were computed.

A test of the significance of the mean difference between the experimental and the control groups on the economic understanding tests was made. A measure of bookkeeping achievement was established for each group from the data collected from the bookkeeping achievement test scores.

What were the significant findings of the study and how may they be of value to bookkeeping teachers for use in their classrooms? The principal findings and a brief discussion of the implications follow.

## Findings of Study

*Gains in basic economic understandings do result from the inclusion of economic units in bookkeeping classes.* The study showed that on both the Nebraska test and the SRA test the mean gain of the experimental group over that achieved by the control group was perceptible. The mean gain on the Nebraska test was 2.6 points for the experimental group as compared to 0.72 for the control group. On the SRA test the mean gain achieved by the experimental group was 3.08 points as compared to 1.20 for the control group. The study further showed that even though approximately 60 percent of the students from each group recorded gains, the gains were much larger in the experimental group than in the control group.

These data seem to substantiate the fact that the integration method of teaching is reasonably effective. There is consistency of greater gain by the experimental group on both tests.

We must realize, of course, that many factors enter into the kind of final result a teacher may obtain. The number of economic units selected, the scope of treatment of each unit, the number of hours spent on economics, and the effectiveness of the teaching method are several of the factors. Yet it remains fairly obvious that positive results can be obtained by the integration method.

*We cannot conclude, however, that the integration method of introducing economics into a business course is a panacea for the cure of economic illiteracy.* When we look at the other side of the coin, we find that caution should be exercised in predicting results achieved by the integration method. Even though the study showed the mean gain by the experimental group was greater on both tests, the mean difference was not quite significant at the .10 level of confidence on either test. Therefore, on the basis of these data, we cannot predict that 90 out of every 100 students will respond similarly when taught the same units in the same manner. (This result differs from that obtained by Griffith in a similar study. He found the mean difference significant at the .01 level.[1])

We should not make a final judgment solely on the basis of the data in a single study, or several studies. The significant point, it seems, is that integration of economic content with any business subject is but one facet of our overall economic education program in our business department. We should regard it as a supplement to formal courses in economics and consumer economics. The program of economic education in the business department should, in turn, be a part of the economic education program of the school and, indeed, of the entire school system.

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[1] Griffith, Bobbie B. "Integration of Economics Concepts in Beginning Bookkeeping Classes." *Balance Sheet* 45:63-64; October, 1963.

*Students do not suffer a loss in bookkeeping achievement as a result of time devoted to economic instruction.* In fact, students seem to score better on achievement tests as the result of economic instruction. The experimental group scored slightly higher on the battery of eight achievement tests published by the South-Western Publishing Company and administered throughout the school year. Griffith's[2] study also showed that the experimental group did slightly better on the bookkeeping achievement test.

This is an interesting observation and one which may be significant. Do bookkeeping students attain greater achievement in bookkeeping as the result of the development of a broader understanding of our business and economic system? Are they better able to relate the theory of accounting and bookkeeping to specific transactions because they understand the general economic structure in which business operates? At this point, we recognize that this is highly speculative. However, there is sufficient evidence to warrant further research.

### Implications for Teaching

*Possibly too much time is devoted in bookkeeping classes to preparation of exercises and problems.* Bookkeeping teachers believe that students learn bookkeeping and accounting principles by applying them to specific problems which simulate actual business practice. We further believe that reinforcement is necessary in some cases. Therefore, most textbooks include several problems or exercises at the end of each chapter. Some textbooks include problems of varying degrees of difficulty. But most "optional" or "supplementary" problems are quite similar to the ones given as a regular assignment to the entire class. Is too much time devoted to these "optional" or "supplementary" problems? The results of the study would tend to indicate that there is.

In the study, the experimental and control groups were given the same explanation and discussion of each bookkeeping topic. Each group did the standard problem or problems at the end of the chapter. However, while the experimental group was being taught the economic units, the control group did supplementary problems or spent more time on the regular assignment. Consequently, it would be expected that the control group should score better on bookkeeping achievement tests because of the greater amount of application of principles. But the opposite was found to be true. As a result, it is suggested that bookkeeping teachers consider "finding the time" to teach economic concepts by "streamlining" their laboratory or study periods.

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[2] *Ibid.*

*Motivation is the key to successfully teaching economics by the integration method.* This is seemingly a trite statement for we all agree that motivation is the key to successful teaching in any subject. But it deserves special emphasis in this particular application. Experimentation in introducing economic content into bookkeeping classes has shown that unless economic concepts are skillfully taught *together* with bookkeeping content, students lose interest. They sense that such instruction is something apart from their regular work and are inclined to regard it as as "extra." Many discussions arise which arouse student interest. This may offer an excellent opportunity to bring in economic concepts. Students then respond enthusiastically.

Of course, not all economic content can be taught in this manner. Some formalized instruction is necessary. But student interest, once aroused, is an excellent springboard for the acceptance of further economic teaching.

Teachers may further speculate about what methods may be employed to expand the economic education program. Will courses in economics be required of all students? This seems to be a doubtful possibility in light of the greater requirements in other academic areas. Since only a small percentage of students elect economics as a subject in their program of study, we cannot rely upon the formalized course alone to accomplish our objective. Consequently, we may assume that emphasis will be given throughout the department. Each subject will be revised to the extent that some economic concepts will be taught. Bookkeeping courses will present outstanding challenges for the creative business teacher.

# 2

# Effective Teaching Procedures

OFFICE PRACTICE AND OFFICE MACHINES

## 1. Preparing Students for Office Occupations

**VERN FRISCH,** New Rochelle High School, New Rochelle, New York

There is no uniformity of titles, content, or use of instructional materials in "Office Occupation," "Office Practice," "Clerical Practice," "Secretarial Practice," "Business Machines," and "Office Clerical" courses.

Even some small high schools offer "Office Practice," which of necessity and because of the small number of students involved, has to include secretarial as well as clerical students. No two schools seem to have exactly the same plan or setup. Some are similar, yes, but there are great differences from school to school.

In many schools course content with various titles has been developed, based upon the work and the employment possibilities of the community. Perhaps this is as it should be, if a large percentage of graduates still find employment in the immediate area. If this is true, the training for office occupations should conform to the office needs of the community.

However, the great mobility of our population today has changed much of this. If graduates seek employment elsewhere, they must have extensive training in office skills so they can adapt to the work in any metropolitan center they may select.

### What Should a Student Learn

There should be a correlation, a bringing together, of all learning that a student has accumulated to date—typewriting, bookkeeping, general business, business mathematics, filing, business law, management, and business machines operation. In addition to specific subject knowledge, the student should:

1. Learn how to apply his present knowledge and skills in a practical office, class, or laboratory situation
2. Acquire many minor office techniques and know-hows
3. Fortify his typewriting skill and ability
4. Increase his number typing skill
5. Gain more facility in business machines operation
6. Know that much of what he does depends upon the work of others and that other people depend upon his work as well
7. Be trained to make decisions and develop good judgment
8. Be able to work well with people and for people
9. Acquire social and business manners
10. Learn to be responsible, dependable, and loyal
11. Recognize that being pleasant and helpful promotes success.

All these personal traits and skills and many others can be emphasized and learned so readily and easily in a good laboratory course. Many little incidents occur in office practice laboratory courses that are forgotten by the teacher but have made lasting impressions upon students. Several years after graduation, a student said, "How well I remember coming to school dressed for an interview at the beginning of our office practice course. The friendly discussion and criticisms that followed did so much for me. I'll always remember it!" Another small incident: A young man working in a print shop said one day, "I remember when I learned to be polite on the telephone. I was taking orders by telephone one day in office practice when there was an interruption. I said, 'Get off the phone, I'm using it.' It was the teacher. I was treated so kindly that I have always remembered the importance of good telephone manners."

### Assistance at the State Level

State department of business education can do much to bring about some uniformity and understanding in office occupations training. Some states have done this or are in the process of syllabi planning. For example, the New York State syllabus for office practice suggests a clerical curriculum which includes Office Practice I in the eleventh year and provides for typewriting, records of various kinds, calculations, and some basic business machines operation. Office Practice II in the twelfth year provides advanced training in office skills. This course emphasizes training on the competency level including business machines in which a unit of data processing is recommended, principally "key punch" machine operation with related "unit control" work.

New York State has also a syllabus for a two-year data processing curriculum as well as a syllabus with all instructional materials for a complete one-year course in dictating machines, and further provides syllabi for all other subject areas of business education.

To extend better office occupational training to more students, New York State has and is establishing "area schools" under the Vocational Education Act of 1963. These "area schools" provide not only training in many phases of vocational education, but also office occupations courses. One course in data processing includes the newer "hardware" and procedures. A small high school that cannot offer such courses can send its students to the area schools which are close enough for daily transportation.

A teacher who is planning or offering a course in office occupations should obtain all necessary related materials from his state department. If he does not have a syllabus, something should be done about preparing one. In the meantime, a teacher could write to the various state departments of education that have good materials and ask for copies of their syllabi.

### *Questions*

A few questions that perplex teachers about office occupations training are:

1. What kind of a class or laboratory should be organized?
2. What and how are skills taught?
3. What types of equipment and machines should be used and how much can be spent for them?
4. Are state or federal funds available?
5. Should it be a textbook course only?
6. Should it be organized on a rotation or battery basis?
7. What about room layout?
8. What can be done about testing?
9. What standards can be established?
10. How can machine operations be taught?
11. What materials are to be used?

The teachers will find that the answers to many of these questions are given in state syllabi.

*A Few Suggestions*

1. A good office occupations course can be planned on the rotation basis around a minimal amount of machines and equipment:

   A typewriter for every student
   Two adding machines—full and 10-key
   Two calculators—rotary and printing
   A stencil duplicating machine
   Two voice-transcription machines.

2. Plan to fortify students' typewriting power and skill with typing copy and much number typing.
3. Plan to acquaint the students with several kinds of basic business forms, such as orders, purchase invoices, sales invoices, payroll records, checks, and stock records. Most of the forms can be duplicated. Customers' orders, purchase invoices, and customers' checks are typed by the customers and creditors department from pre-arranged lists.
4. Integrate the course just enough to show students the flow and routing of papers in an office. For example:

> A customer's written or oral order is given to an order clerk who writes it up on a duplicate sales ticket. . . . The original is given to a checker who checks prices and extensions and gives it to a biller. . . . The biller types a duplicate sales invoice. . . . The original invoice is given to the shipping clerk who records it and gives it to the mail clerk who mails it to the customer. . . . The duplicate sales invoice is given to the shipping clerk who checks it with his records and gives it to the stock record clerk. . . . The stock record clerk records it in his stock record file and then gives it to the file clerk.

The flow or routing of papers and forms can be done in the same manner with checks, purchase invoices, and other papers if deemed necessary. However, never attempt to complete the whole cycle, especially in a high school laboratory—it is just impossible. Notice in the above flow of orders and sales invoices that nothing went to the bookkeeping department. If bookkeeping machines are used, have pre-arranged work planned for the bookkeepers. Some flow of work is necessary to show students the dependence or relation of one department to other departments. It makes the work more realistic. A "flow chart" can be prepared and copies of it given to all departments concerned.

### The Rotation Plan

An assignment chart can be duplicated and the students' names typed in as they are moved from unit to unit. Only one student at a time is moved from a unit in order to leave an experienced person on that unit. The following are suggested departments that may be used:

| *Dept. No.* | *Title* |
|---|---|
| 1 | Office Managers |
| 2 | Ordering, Pricing, Receiving and Shipping |
| 3 | Billing |
| 4 | Stock Record and Mail |
| 5 | Reception and Payroll |
| 6 | Cashier |
| 7 | Customers and Creditors |
| 8 | Editing and Proofreading |
| 9 | Duplicating |
| 10 | Adding Machines |
| 11 | Calculating Machines |
| 12 | Machine Transcription |

Departments can be eliminated or others can be added to the list. How long a student remains on a unit depends upon the number of students in the class. Each student should have been in each department during the course.

### Disadvantages of the Rotation Plan

If there are too many students in the class or laboratory, each student does not have adequate time in each department. In this case, departments can be consolidated. Generally the rotation plan does not allow enough time for the development of high competency skills. Students who are interested in certain machines should be given more time for further development of skills outside of laboratory time.

### Advantages of a Laboratory Course

The greatest reason for persons losing their jobs is their inability to work with and get along with other persons. A laboratory class provides a realistic situation in learning cooperation. It also shows students the intra-relation of departments and the flow of business papers.

## There Are Many Other Excellent Plans

The battery plan of instruction for business machines has its advantages if there is an employment need for many similarly trained people. This is true in metropolitan areas. There are many other good, and possibly better, approaches to training for office occupations. Do not use the whole plan of any one organizational setup for your office occupations course. Plan it for your own particular students and their needs. Bring the best part of other courses into your plan. Some of the things that can be done follow:

. . . Use a bulletin board with display materials of various companies. Use the bulletin board to list job opportunities, the placement of people, and other pertinent information concerning office occupations.

. . . Use an awards system of some kind to stimulate improvement of skills.

. . . Make your laboratory a working office.

. . . Create a pleasant, cooperative atmosphere with emphasis on work and accomplishments.

. . . Correlate a work-study program with your course.

. . . Assign students in pairs for pre-arranged visits to business firms to observe procedures and operations.

. . . Have interesting business people talk to your students.

. . . Use real business data–postal rate bulletins, state and federal withholding tax booklets, instructional manuals and materials of companies, especially machine companies.

. . . Make all operations as realistic as you possibly can.

. . . Read new materials in business and professional magazines.

. . . Visit business offices and become acquainted with managers and supervisors.

. . . Make the content and procedures of your course compatible with those in business–changes in withholding taxes for payroll, postal rates, various records procedure, filing, changes in forms, and data processing.

. . . Keep Your Office Occupations Course Up To Date!

## 2. Twenty-Five Tips for Teaching Clerical Practice

**RUTH I. ANDERSON,** North Texas State University, Denton

As a result of the passage of the Vocational Education Act of 1963, many schools have added clerical practice and secretarial practice to their high school business curriculum. These courses are an important part of the vocational office training program when they are taught effectively. The teaching suggestions that follow are designed to make the clerical practice course an interesting, worth-while experience which will equip the student for his first office job.

1. Have the students assist in the administrative details of the class. For example, students may be appointed to act as attendance clerks, supplies clerks, file clerks, ledger clerks (recording grades on student record sheets), and clean-up clerks. They will have to handle similar responsibilities in the office and should learn the importance of these details while they are in the classroom.

2. Test students early in the course to discover weaknesses in typing usages, spelling, mathematics, and English. Special assignments may then be made for those individual students needing further study without wasting class time in reviewing areas in which most students are already proficient.

3. Have specific jobs students are to complete for each unit. Every student should know exactly what he is expected to do, how to do it, and when the work is to be completed. Jobs for extra credit should be available for students wishing to do additional work or for students completing the basic assignments early. These jobs should include higher level learnings which will be beneficial to the superior student but which are not essential to the mastery of the unit.

4. Use job instruction sheets in those units where they are practical. Job instruction sheets eliminate lost time at the beginning of each rotation period and free the teacher to work with the students individually. Job sheets are particularly valuable for office machines taught by the rotation plan. They should identify the machine or unit, the text or manual to be used, and the supplies needed. They should also indicate the jobs or assignments to be completed with a step-by-step breakdown of the procedures to be followed.

5. Use information or handout sheets to supplement the textbook. Outside readings in business, secretarial, and office publications may be stimulated by requiring each student to prepare two or three such handouts. These are especially useful for updating topics in the textbook such as social security, income tax, and mail regulations which change frequently.

6. If a rotation plan is used, keep it simple. One rotation each six weeks is often more effective than a highly involved plan. If necessary, two units

may be combined in one six-week period to reduce the number of rotations.

7. Emphasize proofreading. Students should have acquired this skill in typewriting, but too much emphasis cannot be placed upon checking work completed. In proofreading papers, check until an error is found. Then return the paper to the student without marking the error and ask him to correct any errors he has previously overlooked. Students should understand there may be more than one error in the material. This procedure places responsibility for proofreading on the student where it belongs and saves both the teacher's time and eyesight.

8. Keep assignments flexible to allow for outside rush jobs, but avoid interruptions unless the jobs will contribute to the students' learning. The clerical practice course should be far more than a laboratory in which students do routine work for the community and the school.

9. Give students actual clerical jobs to perform when such jobs are available and meet the needs of the class. For instance, in the duplicating unit, the students might type and duplicate the handout sheets and job instruction sheets to be used in the course.

10. Occasionally invite a former student now employed in an office to speak to the class. Have the employee describe her responsibilities and bring illustrations of the kind of work she performs.

11. Keep an up-to-date card file of reference and resource material to supplement the textbook. Whenever an article is encountered which is related to one of the units in the course, make a card for it. This file will save many hours later when such references are needed.

12. Develop in the students pride in their work by displaying outstanding papers on the bulletin board.

13. Arrange for demonstrations of current office machines and equipment from local office equipment firms. At times these firms will leave equipment for two or three weeks so that the students may become familiar with it.

14. Include statistical typing jobs with multiple carbons in the clerical practice course. Figures are tremendously important today, and constant practice is required to develop skill in number typing.

15. Whenever possible, use practice sets in such units as filing and clerical office typewriting.

16. Emphasize good work habits such as arriving promptly, beginning work quickly, having all supplies needed, checking for announcements on the bulletin board, and keeping materials organized.

17. Emphasize the importance of regular attendance and promptness. Insist that students make up any time lost through absences and tardiness.

18. Assign committees to prepare posters, charts, and other materials for the bulletin board. Each committee should be given a topic for its display. These committees are also effective for collecting information regarding office and business practices in the local community.

19. Have students rate themselves on a personality rating scale both at the beginning and at the end of the semester. Such scales may be used to evaluate character traits, attitudes, grooming, and office etiquette. At least once or twice during the semester have an evaluation conference with each student such as a supervisor might have with his employees.

20. Have the students develop a manual which will be useful to them on their first jobs. The materials included may be based on information in the textbook, class discussions, or outside readings, and should be filed in the manual in an organized manner.

21. Ask each student to interview one office worker about the responsibilities and duties of his job. The students should compose a letter asking for an interview, prepare an interview guide, and write a report to be presented orally in class. The students should also write a thank-you letter after the interview.

22. Have each student visit a modern, up-to-date office where he will have an opportunity to see the latest office machines and observe the types of jobs performed.

23. Toward the end of the semester have students come to class dressed as they would in an office.

24. Post weekly on the bulletin board an actual case situation describing a problem which has arisen in a business office. Such problems are especially good in the area of human relations. Award bonus points to the student preparing the best solution to the problem.

25. Obtain application forms from two or three local businesses. After the students have completed the forms, return them to the personnel managers. Then invite the businessmen to visit the class and interview those students whose applications interested them. After each interview, the interviewer should explain to the class the student's strengths and weaknesses during the interview. Not only do the students learn how to conduct themselves during an interview, but they gain much needed confidence for those first employment interviews.

# 3. Teaching Clerical Practice Students How To Work

**MARY ELLEN OLIVERIO,** Teachers College, Columbia University,
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The clerical practice teacher seldom has students who have not had prior experience in business courses. His task is generally one of coordinating earlier skills and of introducing a realism into the manner in which students handle their responsibilities in his class. Possibly, one of the most important concerns for the clerical practice teacher is introducing students to the process of work.

### Why a Process of Work?

The teacher might raise some question about the need to introduce students to the process of work. Yet, an analysis of difficulties in the performance of business tasks will often reveal lack of work skills. Employers make comments such as: "She does not know how to arrange her tasks in order of importance;" or "she fails to proofread her letters;" or "she doesn't know what must be done as follow-up of a task."

While there is a somewhat elusive quality to the components of the process of work, the effects of knowing the process are clearly recognized by a grateful employer. The value of an employee who does not require minute supervision is immeasurably greater than that of an employee who must receive cues for each aspect of a task.

The teacher of clerical practice must deliberately teach the process of work. Some students seem to know the process intuitively just as some students can think more logically and more imaginatively than others. Here again we are dealing with individual differences, but nonetheless the process must be broken down into its several parts; and through the assignments provided, the teacher can systematically help students achieve some success in knowing how to work.

### An Analysis of the Process of Work

Knowing how to work is basically a problem-solving process. The person presented with a task to be performed must raise in his own mind the questions that every problem imposes on the one who wishes to solve it.

The basic question that the performer of a task must ask is: "What must be done in order to accomplish the goal set?" The employer who hands a typist handwritten copy and says please make 50 copies of this report is initiating in the typist's mind the above question. Generally, there are limitations imposed on getting the task completed. The employer may, for example, state that he must have the 50 copies within 20 minutes, which would preclude the use of a number of duplicating services that are handled by a central office or an outside agency.

In addition to considering the limitations, the worker must give attention to the alternative means available. Each one of these must be assessed and either rejected or accepted. This process continues until the one alternative that seems most appropriate at the given time is left as the one to be used. It must be pointed out that this process is almost instantaneously completed by the experienced worker who has already encountered the same or similar tasks.

Now, the worker must know the steps involved in doing the tasks so that none of his motions is a wasted one. Again, in the case of the typist who must type from handwritten copy, it is necessary for her to know that the interlay sheet in the master (should she choose to prepare a direct-process master in order to complete the task) must be removed before she begins typewriting. The good worker will be able to go from one step to the next without the need to check with a supervisor or an employer.

Next, the worker must be able to answer accurately the question: "How well have I done the task?" The worker, to be valuable, must be able to evaluate her own work and where she finds it incomplete she immediately makes necessary changes. The typist with the task of preparing 50 copies would proofread her copy carefully to be sure that there are no uncorrected errors. If any question arose concerning the spelling of words, for example, she would not consider her task completed until she checked the spelling in a dictionary.

Finally, the worker must know how to dispose of the task completed. To file the 50 copies of the memorandum after they have been duplicated would not be helpful to the employer awaiting his copies. This step implies the need to understand fully the reason for doing the task.

### What Must Be Done in the Class

Basically, the clerical practice teacher must give students an opportunity to solve problems—ones that are realistic office tasks. These problems must give students experience in venturing into independent decision making. Many teachers do use problems; textbooks often contain realistic ones that are discussed and done by students. However, the solving of the problems is far too often completely guided by the teacher. Each step, for example, is identified, explained, and finally carried through by the student, but then evaluated by the teacher. How common it is to hear in a clerical practice class a student ask: "Is this all right?"

The teacher cannot expect a student initially to be able to solve such work-like problems with the skill of an experienced person. However, in the beginning stage, the teacher must focus attention on the quality of the decision made at each point and on the basis of the decision. Initially, the teacher does guide the students. Over a period of time, though, the teacher relinquishes the responsibility of guiding students and begins to evaluate the quality of the decisions made by the student at each point: deciding what had to be done, coping with limitations, identifying the steps (as reflected in what is actually done), and evaluating the evaluation of the student. Ultimately, the clerical practice teacher wants a fully self-sufficient worker. By the end of the course, the teacher should have adequate evidence to give validity to his judgments considering how well the students know how to work. Doing what is to be done in the way the teacher prescribes it is not sufficient for our students today; a far more mature worker is required.

## 4. Try a Cost Approach to Accuracy

**ROBERT E. HOSKINSON,** Washington State University, Pullman

"You mean you marked it wrong just because I omitted a comma?" "You didn't tell us we had to verify extensions!" "But the word was spelled incorrectly on the copy you gave us." Comments such as these frequently plague business education teachers. Findings in countless studies have indicated that accuracy is a prime requisite of office employment. Despite determined efforts to make students conscious of accuracy, teachers often find the results somewhat discouraging.

The business teacher must not succumb to a "what's the use" attitude when it comes to developing within his students those attitudes and habits which will result in accurate work performance. Errors in the office are expensive. Cost control has become a major concern of the officer manager. He has a right to expect consistently accurate work from his employees. Furthermore, with the adoption of automated data processing systems in many offices, a seemingly insignificant error made in the input data or in the programing may be compounded many times. As a result, it shows up in output as an error of serious consequence.

Learning experiences in basic skill-building classes may provide students with a somewhat distorted concept of acceptable accuracy standards in business. The usual teaching pattern in such classes entails alternate drives for speed and accuracy. Even when the emphasis is on accuracy, some provision is usually made for an error allowance. Moreover, problem work completed in these classes is usually graded on an A-to-F scale rather than on a mailable or unmailable basis. Such practices are sound; however, unless students have had opportunities to participate in a variety of office-type jobs which are evaluated against acceptable office standards, they are likely to think of accuracy only in terms of a five percent error allowance on a five-minute take or a one-error-a-minute allowance on timed writings. It is imperative that students become accustomed to the idea that 100 percent accuracy is expected for most clerical work in the office.

Because of the very nature of his course, the office practice teacher has a unique opportunity to develop attitudes and habits conducive to accurate work performance. Since his class is often offered in the senior year, the proximity of initial employment may make the demands of business just a little more meaningful to his students than they have been in preceding courses. In addition, the office practice class is considered a finishing course; consequently, many of the class activities are designed to give the students opportunities to integrate previously learned skills in various problem situations which closely resemble the kinds of work clerical workers perform on the job. Projects of this type can more justifiably be evaluated against prevailing business standards than can skill-building activities in stenography and typewriting classes.

The unique opportunities which the office practice teacher has to make his students accuracy conscious may be diminished by the approach which he takes toward achieving this extremely important objective. One office practice teacher, whom we shall call Mr. Brown, had used a variety of approaches. He had pinned mottos on the bulletin board which read "Be Accurate," "Proofread Carefully," and "Follow Directions." He had preceded each office practice project with the admonition, "Now check your work carefully; remember, your boss demands 100 percent accuracy on the job." On other occasions he had thought to himself, "It's about time I teach these kids a lesson!" whereupon he marked an *F* on a project which contained an uncorrected error. Platitudes, admonitions, and penalties, however, did not seem to have a lasting effect upon his students. Accuracy seemed to be considered as a means to an acceptable grade on a project rather than as a trait to be developed for eventual job proficiency.

After analyzing his problem, Mr. Brown decided to try a different approach toward the development of these habits and attitudes which he hoped would result in accurate work performance. He reasoned that perhaps accuracy would become more important to his students if a dollar-and-cents value were attached to it.

One morning shortly thereafter, his students encountered an intriguing bulletin board display as they entered the office practice laboratory. "*Someone Goofed!*" read the caption. In one corner of the display, two mischievous gremlins were at work. One was depositing a file folder clearly marked "*Adams, Paul*" in a file drawer conspicuously labeled "*PA-PY.*" The other character had just multiplied $100 by 4.5 percent and was placing the decimal in the wrong position. Under the caption were mounted a number of newspaper clippings describing actual incidents in which clerical errors had resulted in rather serious consequences. One told of a revised bill which had come to the President for signature because an extra comma had changed the intended meaning in an earlier bill. Another described the disastrous consequences which occurred when a clerk punched a wrong number on a computer punch card. As a result, a Seattle shipyard received notice that 22,000 rifles were being sent to them rather than to the Utah Naval Supply Depot for which they had been intended. Still another described the plight of a Texas farmer who was being asked to refund approximately $2,000 worth of indemnity payments which had been made to him by the Federal Crop Insurance Corporation over a period of six years even though he had paid his premiums regularly. The government clerk who processed his original application had inadvertently placed the farmer in an insurable category for which he was not qualified.

Following the class bell, a lively discussion took place as the items on the bulletin board were read. Students were quick to add illustrations of other costly errors about which they had heard. As each illustration was presented, Mr. Brown encouraged his students to analyze the reasons the error may have been made, to estimate the cost of the error to the employer, and to suggest precautions which might be taken to avoid similar errors. The students were amazed and perhaps a bit skeptical when their instructor reported that the estimated cost of the average misfile was $61.23 and that the dictated business letter often costs $2.00 or more. In fact, the figures were so startling to the class that they decided to investigate the costs of other common office activities. As the instructor summarized the class discussion at the end of the hour, he placed special emphasis upon these four points: (a) errors cost money, (b) errors cause loss of good will, (c) errors cause embarrassment, and (d) even the seemingly insignificant error often results in dire consequences.

In the weeks which followed their initial discussion, the office practice students continued to bring examples of costly clerical errors to class. Mr. Brown made it a point to refer to each of these examples in class as a means of reinforcing accuracy consciousness on the part of his students.

Throughout the year as individual students made errors in their class projects, Mr. Brown reminded them of the consequences of similar "goofs" which had come up at one time or another in class discussions. Then, instead of resorting to a sarcastic reprimand, he asked the student involved to analyze his error in terms of (a) its cause, (b) its estimated cost in dollars and good will had it occurred on the job, and (c) the precautions which might be taken to avoid similar errors in the future. As the result of his cost approach to accuracy, Mr. Brown found that many of his students had begun to think of this trait as a requisite of employment as well as a means of attaining a good grade in his office practice class.

## 5. Teaching Students How To Listen

**HARRY L. GIBSON,** Georgia State College, Atlanta, Georgia

Are we missing the opportunity to teach in the office practice class a valuable skill needed by all office workers? That skill is: How To Listen. Listening, recognized by management as a valuable tool, is a skill that can be taught. Canfield[1] found that either indirect or direct instruction in listening development can add significantly to the student's listening ability. It is a skill that should be taught for two reasons: (1) Listening is a learning skill; that is, a skill that aids learning. As a learning skill, listening should be included within the student's program just as reading, writing, and arithmetic are a part of his educational program. (2) The student will find that, in his chosen occupation, much of his advancement will depend upon his utilization of learning skills—what he learns on the job determines to a high degree his advancement. Consequently, we must prepare the student with as much facility in learning skills as possible. We recognize this, for we continuously strive to upgrade the student's ability to read, to use words correctly so that he can communicate intelligently, and to work with numbers. Listening, however, is an area that has been neglected.

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[1] Canfeld, Robert G. "How Useful Are Lessons on Listening." *Elementary School Journal,* December 1961. pp. 147-51.

The student will find in the office that oral instructions are given more frequently than written instructions. At times, the worker will write the information given to him; at other times, he will not be able to do so. Even if he takes notes, he usually is unable or does not desire to write the instructions verbatim; therefore, he must organize his notetaking so that no main points are omitted.

### Including Listening in the Program

Because listening is important in performing efficiently in the office, it should be included in the student's education for business. Some may say, "I already teach my students to listen." But, does this teaching go beyond the frequent admonition. "Let me have your attention, students." or "Pay attention, class"? The teacher may get the student's attention, but is the student really listening? Listening involves more than just looking at the speaker. Too often, attention is faked; that is, the listener's eyes are fixed on the speaker, but his thoughts are miles away.

Listening may be taught in typewriting, particularly in conjunction with the teaching of composition at the typewriter. Perhaps office practice is the most desirable subject for teaching listening. In office practice, we attempt to bridge the gap between the marketable skills and their application in the office; and, too, in office practice, we can place more emphasis on developing the skill than in any other business subject.

### What To Do

The following are some suggestions that might be used by the teacher:

1. Rather than to write the directions for problems or tests, read the instructions to the class.

2. Read short paragraphs to the students and ask for a summary.
3. Give a five-minute talk and have the students take notes on the talk. Make the talk pertinent to class discussion.
4. Indicate some of the duties and courtesies of a good listener, such as (a) Look directly at the person talking. (b) Avoid distracting mannerisms. (Have the student analyze his listening technique; even though the person may be listening intently, he may have some habit that distracts the speaker.) (c) Do not interrupt the speaker. (d) Withhold judgment of what the speaker is saying until you fully comprehend what he has said. (e) If you do not agree with the speaker's point, look for evidence supporting his views or beliefs rather than to look only for evidence that will disprove his arguments. This is particularly true in listening to instructions. Even though you may think your method is more efficient, weigh the speaker's method before raising an argument or rebuttal.
5. Give a series of oral instructions. Allow the students to take notes on the instructions in some exercises; in others, do not allow notetaking.

### Teaching the Taking of Notes

Combined with the teaching of listening is, of necessity, the teaching of taking notes. Few of us have such excellent memories that we never have to take notes. How to take notes should be taught in the office practice class—especially to the students who have not had shorthand. The student should be trained in organizing that which is given to him orally so that he can jot down comprehendible, legible notes in longhand. Even in the secretarial office class, the student should learn how to take notes. Not everything recorded in the business is taken verbatim. Many occasions arise in which verbatim notes are unnecessary—recording of procedures at conferences, business meetings, lectures, and the like.

Before an attempt is made to include listening development in the classroom, the teacher should study some of the work that has been done in this area. One well-known book is *Are You Listening?*[2] The authors, Nichols and Stevens, present "Forty-four Things To Do," some of which are adaptable to activities in the office practice classroom. Our students have to listen to learn; let's teach them how to listen..

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[2] Nichols, Ralph G., and Stevens, Leonard A. *Are You Listening,* New York: McGraw-Hill Book Company, 1957.

## 6. Carbon Duplicating

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How many business teachers actually teach the proper use and the proper selection of carbon paper? How many persons engaged in office work have had the experience of making master carbons and following through on the duplicating process? Emphasis in typewriting, shorthand, and other secretarial classes is primarily on the development of technique and speed; only a limited amount of time is allowed for anything else. The majority of the typists begin their first job knowing very little about the various weights, finishes, colors, kinds, and uses of carbon duplication.

Carbon duplication is not a new process. Four thousand years ago the Babylonians had their own method of duplication. They made duplicate copies by pressing a hard clay roller with raised letters into a soft clay tablet. Their method, after once getting the master roller made, was about as fast perhaps as our antiquated gelatin process. Until early in the 1900's paperwork was not too essential in the office; but with the passing of the first Federal Income Tax Law forcing people to keep records, the demand for paperwork was greatly increased. The government requires more reports than ever before. New taxes, social benefits, rapidly growing industries, and many other factors have increased the demand for more and more paperwork. Modern business thrives on paper tools.

With this increased demand for paperwork, the modern business office is making extensive use of carbon paper and duplicating machines to reduce the amount of copying on the typewriter.

### Carbon Paper

Carbon paper is available in a number of weights and in several finishes. The lighter weight paper will make a greater number of copies; the heavier weight paper will not make as many copies but it lasts longer. The weight of carbon paper is described in terms of pounds. It comes in 4, 5, 6¾, 7, 8, 9, 10, 12, 14, 16, and 20-pound weights. The proper selection of carbon paper will depend on several factors and will vary with the different operators and with different jobs. Some of the varying factors are the touch of the typist, the size of the type, adjustment of the typewriter, and the weight of the writing paper. What will work for one person may not work for another, because of differences in equipment being used; therefore, it requires experimentation on the part of the individual user. For ordinary use and when no more than one to four copies are required, generally the 7-pound carbon is sufficient.

There are three categories of typewriters and each has its own peculiar needs in carbon paper: the electrical action, the standard action, and the noiseless action. The electric machine has a touch control which increases or reduces the striking force of the type bar. Since the type bar is driven electrically and can be controlled by the touch mechanism, the touch of the typist has little to do with the number of legible copies produced. On some electric machines, with the proper selection of carbons and copy papers, as many as 18 to 20 legible copies can be produced. The newer standard machines also have a touch control attachment which will increase or decrease the striking force. The noiseless machine uses a push action which is comparatively weak and has very little penetrating force; consequently, the more intense carbons are required for effective use on this type of machine. Some carbons are marked specifically for use on noiseless type machines and much better results can be obtained if this carbon is used.

The size of the font will also affect the legibility of carbon impressions. The elite type will penetrate a large number of thicknesses, but some of the characters may not be too legible because they are small. The intense finishes of carbon are not recommended for this size type. Pica type can be used more effectively because the type is larger.

The kind and weight of the copy paper used will affect the intensity and sharpness of the impressions. If heavy copy paper is used, the lighter carbon paper should be used to give satisfactory results.

### Spirit Carbon Process

The spirit carbon process is the most modern adaptation of the hectograph process and is often referred to as liquid or direct process. It is a comparatively fast, easy system and will duplicate up to approximately 500 copies.

The spirit carbon is attached to the master sheet and inserted in the typewriter so that the carbon will be in reverse image on the back of the master sheet. To insure clear impressions the typewriter font should be thoroughly cleaned. When the master copy is ready to be reproduced, it is separated from the carbon and attached to a drum of a spirit duplicating machine. The copy paper is fed into the machine and a wick deposits fluid on it which acts as a solvent when the paper comes in contact with the carbon ink on the master sheet. The secret to being able to produce a large number of copies depends on the flow of fluid and the amount of pressure applied. If a great number of copies is needed, the pressure mechanism should be set on light control and the fluid flow mechanism should be on light. As the copies become lighter, the fluid and pressure controls should be gradually increased. If the machine is hand operated, the copy paper should be very quickly rolled through because the longer the copy paper is in contact with the master, the greater the amount of aniline dye that is transferred. Slower machine speeds will give brighter copies, but fewer copies can be produced.

Spirit carbons can be obtained in several colors: purple, which is the key color; red; blue; green; and black. All five colors can be used on one master copy by alternating the carbons. The use of different colors can be very effectively used in advertisements, programs, or forms for various uses. Special effects and very attractive designs can be obtained by the use of a pencil with a sharp point or a ball point pen, screen plates and a blunt stylus, and the typewriter.

The copy paper used for the spirit process is very important. The brightest copies are obtained by the use of a smooth, white matte surface. The paper designed specifically for the spirit duplicating machine is most effective and this paper is usually packaged and marked to indicate the side that should be placed up on the feed table of the duplicator.

### Azograph Process

The Azograph is another liquid type of process. Many typists prefer this over the carbon process since it does away with the staining of hands and clothes. Preparation of a master is similar to that for the spirit process.

There is a master sheet and a transfer sheet which is coated with a light brown wax that contains the color-forming compound. The wax coating is transferred to the master sheet in reverse image and is a light brown color. When the copy paper is inserted in the duplicator, it is moistened with a colorless fluid which becomes activated with the image to produce a legible print on the copy paper. The major difference in this and the spirit process is that the wax coating containing the color pigments does not smear or stain since the color producing element is in the liquid. Approximately 100 legible copies can be produced from this process.

# 7. Offset Duplicating

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The use of the offset duplication process has increased in popularity in modern business and school offices. The quality of the reproductions and the low unit costs involved are the primary reasons for the increase. The day is not too distant when offset duplication will replace many carbon and stencil duplicating processes, especially in larger businesses and schools. The reasons are simple. Every business organization is vitally concerned with reducing operation costs in order to realize greater profits. Offset duplication reduces costs through speed, accuracy, simplicity, versatility, uniformity, quality, and quantity of reproductions.

The popularity of the offset duplication process is evidenced by the number of manufacturers of office equipment who have recently marketed some type of offset duplication equipment. Until recently, only a limited number of companies were engaged in manufacturing these machines.

Business teachers in colleges, junior colleges, high schools, and business schools must recognize this trend and make a sincere effort to provide their students with the skills necessary to operate these machines. Instruction should include all phases of the offset process. This includes preparing the master, operating the machine, and utilizing techniques such as corrections, substitutions, deletions, and additions on the masters.

The best class for offering instruction in offset duplication is office machines, provided this class is offered in the school. If not, several other business classes could easily justify offering it. Among these classes are clerical practice, secretarial practice, typewriting, and office management.

## The Offset Process

There are two methods used in preparing masters for offset duplication. The first is accomplished by photographing the original copy on a sensitized plate, which when developed becomes the printing medium. The second method requires that copy be typewritten on a specially prepared master sheet. It is also possible to use several colors of ink in this process. Almost any color of paper stock is available for offset duplicating.

The offset process is based on the principle that the moisture and ink used in the duplicator do not mix. Moisture applied to the direct image master, or the photographic master, repels ink in the open or non-image areas. The image on the master has an affinity for the ink applied to the master at each revolution of the machine. In the duplicating cycle, the inked image on the master is transferred to a rubber blanket and then "offset" onto the paper.

There are two types of duplicating masters from which words, lines, and pictures may be reproduced in any color or in any quantity. One type master is a smooth, paper-like material and is handled like an ordinary sheet of paper. Several thousand copies can be made from this type of master. Images may be typewritten, drawn, or ruled. They will reproduce any images placed on them and in exact degrees of density and shading. The copy, whether it be number one or number five thousand, is reproduced exactly. Corrections can also be made with a special rubber eraser in the same manner as correcting typewritten errors. The second type of master can be of either zinc, aluminum, or paper. The masters are prepared by exposing them to strong light through a photographic negative. Photographs are then produced from photographic masters. The metal masters will allow up to 25,000 reproductions with the use of the original master.

### Cost of the Process

The cost of the offset process is low; and when compared with the time and supplies necessary for secretarial and clerical help to produce thousands of originals, it is minimal. One machine requires but a minute to make an offset master at a cost of less than 20 cents. It is less expensive than the carbon or stencil process and produces a clearer, cleaner, and neater reproduction.

Machines are available that will produce from 5100 to 7800 copies an hour with one master. This is an average of from 85 to 130 copies a minute. In addition, the low cost of the original machine, partly due to the competition in the field, is within the reach of most schools and businesses, regardless of size.

More attractive folders, brochures, and advertisements can be reproduced on offset duplicators because of the different types of paper stock on which the reproductions can be printed.

The small offset duplicators are adjustable to any size of paper from a 3" x 5" card to a 11" x 14" sheet of paper on automatic feed and from a 3" x 5" card to 11½" x 16" sheet of paper on hand feed. The range in paper weight is from a 13-pound bond paper through cartons and booklets of 1/16 inch in thickness. Some machines have an automatic adjustment for the size of paper that is fed through the machine.

The size of modern office equipment is of utmost concern to the office manager who is interested in utilizing all available space in reducing overhead costs. The size of offset machines is an important consideration, one that will affect their adoption by businessmen.

In size, the offset duplicator compares favorably with other types of duplicating equipment. It occupies about the same amount of floor space as the carbon or stencil process machines, but some are slightly larger.

### Ease of Operation

The offset duplicators are easy to operate and do not require too much of the instructor's time. The time necessary to master operation of these machines is not much longer than it is for learning to operate the carbon and stencil process machines.

Corrections or alterations can be made with a rubber eraser specially for this purpose. The masters can be changed in a matter of seconds, interchanged without adjustments, and read as easily as a typewritten letter. Information can easily be added, deleted, or substituted during or between runs. The masters can also be filed and rerun. In addition, it is possible to reproduce a master from a master, something that is impossible in the carbon and stencil process.

There are numerous uses for offset duplication in businesses of all sizes. The reproductions can be used for bulletins, common business forms such as purchase orders and requisitions, sales orders, inter-office communication forms, important telephone numbers, directories, letterheads, financial reports, safety bulletins, brochures, pamphlets, and newsletters, just to mention a few. Two-color duplication has unlimited usage, especially in larger businesses.

### School Uses

Educational institutions of all types, sizes, and in all locations can make excellent usage of offset duplication. In a majority of the secondary schools and smaller colleges and universities one offset duplicating machine can be utilized to serve many departments, the administration, and the board of education.

It is preferable to house the machine in a room occupied by the business education department. This enables the business teacher to have the machine readily accessible for business classes. The business classes will not spend a large amount of each day or each school term on this one machine; thus it will be available for use by other school personnel. The business teacher is afforded an excellent opportunity to promote good internal public relations by rendering both service and instruction to colleagues, organizations, and administration.

The business teacher may be designated as sponsor of some extra-class activities in addition to the regular teaching load. Two typical assignments for business teachers are the yearbook and the school newspaper. Offset duplication produces quality newspapers and yearbooks at a low cost.

The offset process enables the students and faculty to produce the entire yearbook. This includes the photography, typewriting, reproduction, and sometimes the binding, which may be done with the aid of the industrial arts department. The students gain pride in completing the entire yearbook themselves.

The school newspaper will be a more attractive and eagerly received production when done on the offset duplicator rather than by carbon or stencil process. Color may be used in addition to the actual photography done by students. The savings to the school and students in the production cost of the yearbook and newspaper will be great.

The business classes can also reproduce all business forms necessary for use in typewriting, general business, clerical and office practice, machines, and bookkeeping classes. The class can devise the forms that are necessary and will not have to rely on the limited quantity and poorer grade of paper stock provided in workbooks.

### Type of Instruction

If business teachers are to educate their students to become better skilled in the phases of work required in offices, they must include instruction in all phases of the offset process. This instruction should be given as a part of a regularly scheduled business class.

Sufficient instructional time should be allowed for each student to have the opportunity of typewriting, drawing, photographing, shading, and coloring on offset masters. The absolute minimum is at least one master that requires each of the foregoing activities, or a combination of them. If possible the work should be part of a regularly scheduled project, thereby adding practicality to it.

Each student should be required to make corrections, additions, deletions, and substitutions on the masters. In addition, the student should be required to demonstrate skill in the operation of all working parts of the machine. A high standard of workmanship should be required of students on all individual assignments before a satisfactory grade is given. The business teacher should reject any finished reproduction that he would not release as being representative of his standards.

The teaching method that should be used is the demonstration method. The teacher should carefully demonstrate each phase of the operation that the student is expected to perform. This includes the preparation of the master, the alterations to it, and the actual operation of the machine. Questions should be answered immediately before proceeding to the next activity.

The instruction should be conducted with the use of a check list, proceeding in logical sequence. The instructor should list each step and then check it off after it has been demonstrated to each group in the rotation plan. This will eliminate forgetting certain parts of the instruction. Notes should be made regarding points that are not clearly presented or understood and about which questions are raised. These notes will enable the teacher to make constant revisions in his teaching sheet.

## 8. Stencil Duplicating

**JOHN C. GILLIAM,** Texas Technological College, Lubbock, and
**JAMES ZANCANELLA,** The University of Wyoming, Laramie

Modern business activities could not be carried on successfully without the dependable flow of accurate information. Information must flow vertically and horizontally in any given business. It must flow upward to executives for decision-making activities, and it must travel downward for explanations and instructions. To achieve coordination, information must travel horizontally between departments and divisions. The unrestricted flow of information is essential to the planning, coordinating, and success of business activities.

As business activities increase in complexity, the need is constantly becoming greater for multiple copies of various business communications. It is common practice to require several copies of business forms such as merchandise orders, customer billings, accounting statements, and a variety of reports and bulletins. It is apparent, however, that many businessmen are not aware of the potential that duplicating machines offer in increasing the efficiency of business operations. Many businessmen, when in need of multiple copies, still rely upon copies that are rewritten or produced through carbon. In many instances, this is a time-consuming and costly procedure. Businessmen fail to appreciate the importance of duplicating jobs, whether they require five or five thousand copies. Certainly it must be recognized that duplicating machines offer savings in time and costs that no businessman can afford to overlook. In addition, there are many other advantages to office duplicating machines. Modern duplication may be used often as a substitute for printing without undue sacrifice of the advantages of printed materials. The business firm with its own duplicating process can make its own forms, keep an inventory of these forms at a lower level than might otherwise be possible if it were necessary to have the forms printed, and change the forms at will if necessary. Also, confidential information can be retained within the business firm. These are a few of the many advantages of office duplicating.

Today, with the trend toward more automatic machinery, and automation in the office as well as in the factory, any discussion of duplication takes on a much broader concept. It must include the transmission of repetitive information through paperwork systems to eliminate repetitive work. Therefore, the functions of duplicating may be said to be two-fold: "general office" and "systems."

General office duplicating exists for the purpose of bringing the same information to many individuals. This is accomplished by means of sales letters, bulletins, price lists, accounting sheets, posters, house organs, and similar communications.

Systems duplicating refers to the duplication of data in business systems. Most business systems are repetitive. Procedures such as order billing, production, purchasing, and payroll require rewriting the same data in different combinations on different forms.

Before going further into a discussion of duplication, it might be well to ask: What is the "best" method available for office reproduction? There is no "best" method for all situations. Before a best method can be determined for a given office, the following factors must be considered:

1. Quality of copy desired
2. Quantity required
3. Size of duplication
4. Material and labor costs
5. Time element or urgency
6. Design of copy
7. Equipment limitations
8. Necessity of color.

The wide use of duplicating appliances and a universal desire on the part of office supervisors and managers to improve the quality of production has earned a place of dignity for duplicating work in the field of office occupations. Consequently, stencil duplicating and fluid process duplicating, duties long considered on the office-boy level of accomplishment, are now included under the heading "Duplicating-Machine Operator, I and II (clerical)" in the *Dictionary of Occupational Titles.*

The development of stencil duplicating started during the early 1880's. Original inventions were made almost simultaneously in the United States and in Europe. The process is basically one of forcing ink through a stencil on which copy has been typewritten, drawn, or written. Essentially, the mimeograph consists of a drum which is perforated on one part of its surface permitting the ink inside of the drum to seep through the perforations soak a flannel pad which covers these perforations on the outside of the drum and penetrate the stencil placed on top of the pad. When the drum is rotated around its axis, paper passes between it and an impression roller at timed intervals receiving copy from the stencil.

Early day stencils would now be considered rather crude in the light of modern day stencils and their durability and flexibility. While early stencils were laboriously prepared, modern day stencils can be prepared in minutes electronically. Early day mimeograph machines were just as crude as the stencils used on them. These machines were clumsy manually operated pieces of equipment, while modern machines are now almost fully automatic and require only a minimum of effort for operation.

At the present time, there are about ten major firms manufacturing and distributing stencil duplicators in the United States. Many of these companies spend thousands of dollars each year in research and development programs designed to make stencil duplication even better. Recent developments indicate that stencil reproduction processes will be so perfected that the most complex types of copy can be reproduced in a few minutes with the appearance of a professional printing job.

Each type of duplicating has certain advantages over other types. It is, therefore, important for the person responsible for duplicating procedures in the office to fit office requirements to the various duplicating methods.

Duplicating activities can be, and frequently are, expensive and wasteful. Proper control eliminates unnecessary duplication, helps to avoid the preparation of excess copies, and cuts costs generally. A firm doing a great deal of duplicating work should make constant cost analyses of its activities.

A method of controlling duplication costs is the establishment of standards of production for each worker. There are no set standards that can be applied universally. However, each firm can make its own analysis of production standards within the company. If necessary, corrective steps such as training programs can be inaugurated.

There are two important implications for those responsible for preparing prospective office workers: (a) stencil duplication is one of the most common methods of office duplication, and the ability to do stencil duplicating efficiently is a definite asset to a large number of office employees, and (b) office practice and office machines courses should be designed to acquaint students with the potentialities of stencil duplicating (as well as other types of duplicating) in facilitating the day's work. For those teaching office practice and office machines courses, the following objectives and outcomes are outlined:

A. General objectives
    1. To acquire familiarity with stencil duplicating and other duplicating processes commonly used in the office
    2. To acquaint the prospective office worker with the possibilities of saving time and money through the use of stencil duplicating and other duplicating devices
    3. To emphasize the importance of developing desirable personality traits and work habits

B. Specific objectives
    1. Skills
        a. Preparation of the stencil or master copy
        b. Efficient and neat corrections on the stencil or master copy
        c. Learn to operate the mimeograph machine efficiently and be able to adjust and care for the machine
        d. Use the mimeoscope when drawing designs or letters on stencils with the use of the appropriate stylus and lettering guides
    2. Understandings and knowledges
        a. Know when stencil duplicating is best suited for a particular job
        b. Be able to select the best illustrations and materials for a given duplicating job
    3. Attitudes, personality factors, and work habits
        a. Develop the ability to get along with others, including both attitudes and actions
        b. Develop the ability to work independently and cooperatively toward the completion of a job
        c. Develop habits of accuracy and orderliness
        d. Develop the ability to plan procedures and organize materials to accomplish a job efficiently
        e. Develop pride in work completed

The foregoing list of objectives and outcomes is not considered to be all inclusive. There are several variable factors that must be considered before a final list of objectives can be formulated for any type of duplicating unit. Among these are (a) size of the school, (b) size of the school budget, (c) machines available, (d) the uses of the duplicating processes in the area which the school serves, and (e) the time which can be allocated to instruction in the duplicating process. It is necessary to analyze these variables in order to formulate objectives and standards for the duplicating unit. A unit on stencil duplicating should be well organized and include all phases of the duplicating process.

It is necessary that prospective office workers be taught all the basic fundamentals to produce quality work. A teacher who follows the accepted rules for instructing students in the correct preparation of stencils will find the results rewarding.

## TYPEWRITING

# 9. Typewriting and the Vocational Education Act of 1963

**T. JAMES CRAWFORD**, Indiana University, Bloomington

Recent enactment of the long-awaited Vocational Education Act of 1963 has created unparalleled enthusiasm over the potent possibilities of education for the office occupations. That there will be increased emphasis on job efficiency there can be little doubt; and that teachers will have to give serious thought to the need for intensifying instruction to attain levels of employability appears to be equally certain.

The fact that sizable expenditures may be made in the not too distant future for improving and expanding vocational business education suggests that business teachers begin now to evaluate current offerings in terms of the changing demands of modern business offices. Typewriting teachers, in particular, have good reason for registering keen interest in the changing office scene because of the high employment probability of their products.

With the passage of the Vocational Education Act of 1963, there is great likelihood that increasing numbers of typewriting students will find their way into modern business offices. To assure these future office typists of maximum employment opportunity and to gain most from the expenditure of federal funds for office training, it appears urgent that some attention be directed to the nature and demands of offices into which these typists may go.

Recent studies of typewriting activities in automated offices reveal changes of significance of which teachers of typewriting should be aware. The following observations, existing in varying degrees among the offices studied, represent an inventory of common factors which might well be considered by teachers charged with the responsibility of preparing typists for successful employment in modern offices.

Office equipment is quite different, in many instances, from that encountered in typical classrooms. Typewriters engineered to enable typists to prepare magnetic or punched tapes are common in large offices. While many schools may not be able to provide training on these costly machines, students must be made aware of the eventual possibility of their having to use such equipment so they will not be awed when introduced to such typewriters on the job.

There is a decided increase in the amount of handwritten copy from which typists must work. Interestingly enough, much of the handwritten copy is prepared without regard to legibility; thus, typists are required to decipher materials which, according to readability standards, might be classified quite low. It is imperative that future office workers have experience in typewriting from other than precisely written, neatly spaced copy.

There is a decided trend upward in the amount of technical copy to be handled by typists. Reports, statements, and even correspondence reflect in increased quantities technical and statistical data requiring the typist to demonstrate mastery of both the alphabetic and figure-symbol keyboards. In the future, there must be added emphasis given in the typewriting classroom to the development of high skill on the total keyboard.

The installation and use of costly automated equipment places new stress on speed with accuracy. Typists responsible for preparing tapes at the input level as well as having to insert essential information while the automated equipment is operating must be capable of performing their tasks without slowing down appreciably the costly machines involved. Businessmen have emphasized the cost-supported fact that expensive automated equipment can be justified only when it is operated with maximum efficiency; and to maintain efficiency, typists must be able to operate these costly machines with high speed and minimum error. Classroom instruction in typewriting, therefore, must concern itself with both speed and accuracy.

Automated offices require typists to work under pressure. Companies having production quotas, and those gearing salary increases to merit ratings, generally require their typists to apply themselves diligently for sustained periods of time. As a general rule, the more closely a typist is tied into automated equipment the greater the pressure under which that typist works. An expression voiced frequently by businessmen interviewed was: Typewriting teachers must teach their students to work under pressure if those students plan to get ahead in reputable offices. Thus, a new dimension may be added in those typewriting courses geared to vocational competence.

Modern offices require typists to be able to concentrate on their work even though the atmosphere may be noisy and, in many instances, somewhat tense. Rooms accommodating groups of automatic typewriters, consoles of typewriters and computers, and the like, tend to be noisy and sometimes quite heavily trafficked. It is imperative under such circumstances that typists maintain composure and that they not be distracted easily from the tasks for which they are getting paid. The extent to which such ability is developed in the typewriting classroom very conceivably could influence the ultimate success realized on the job.

There is growing demand for typists to be able to detect inaccuracy. That typists will make mistakes is a condition of employment which most managers are willing to accept, even though with some reluctance; that typists be able to detect the errors they make is a point of view held with unyielding firmness by most employers.

There is universal insistence upon the necessity of typists being able to follow directions exactly. Modern offices are highly complex, well organized places of business which operate on the basis of scientifically developed plans. Typists and other office workers must be able to perform in harmony with over-all company directives; it is essential, then, that future office workers be given intensive training in following directions precisely as given. Excellent opportunities for developing this direction-following capacity may be afforded typewriting students in problem and production activities.

Typists in automated offices must expect constant measurement and evaluation from management. Costly machine installations accompanied by specific job demands have resulted in increased supervision and measurement. Performance of typists and other workers is evaluated much more frequently than heretofore; and there is a decided increase in the contacts between supervisory personnel and those operating typewriters. Typewriting students, while in training, must become accustomed to close supervision and frequent personal appraisal by the teacher if they are to bridge the gap between the classroom and the office satisfactorily.

The theme of all efficiently run offices is productivity. The worth of any typist to a business is determined, in large measure, by the ability of that typist to turn out volumes of acceptable work. Many firms have established quotas which must be attained in order to hold a typewriting job; and still other firms use production figures as a basis for promotion and salary increases. One major industrial concern requires all typists to produce 160 invoices in an eight-hour day; other quotas are established with equal firmness for other typewriting activities. In all instances, production performance is measured realistically, credit being given for only what is done. No artificial measures are employed to distort production measurement. To prepare students for office typewriting, then, intensive, continuous effort should be directed to production typewriting activities.

Typists in modern offices must be skilled in materials handling. To keep automatic equipment operating uninterruptedly requires skill in handling all materials required in the execution of typewriting assignments. Considerable attention should be given to this phase of instruction in all typewriting classrooms.

Office typists must be resourceful. Seldom, if ever, are supplies, resource materials, or related items so organized that the typist has merely to copy the work outlined. More typically, typists are required to assemble and organize materials obtained from various sources in order to complete the tasks assigned. Sound classroom practice, then, must provide opportunities for typists to gain valuable experience in locating, assembling, and organizing materials to be used in completing their assignments.

Typists and other office workers are expected, increasingly, to be able to make routine adjustments on equipment. No company expects a typist to handle major machine breakdowns; however, it is common practice to expect typists to make minor adjustments when such adjustments can be made with little effort on the part of the operator. It is an essential requirement that typists be able to keep the machine operating as efficiently as possible; and instruction is provided to enable typists to perform reasonable machine adjustments.

Typists must be able to handle materials containing difficult vocabulary. The level of syllabic intensity in many offices is considerably higher than that encountered in typical classrooms. Perhaps one of the urgencies in preparing typists for office work is to require them to type copy of higher syllabic intensity than that ordinarily experienced in classroom activities.

To work successfully in a modern office, typists must have a sense of responsibility. They must be made aware of the fact that they do not work unto themselves and that they are personally responsible for the results of their efforts. There must be a realization of the fact that whatever one typist does affects the performance of the entire company. Possessing a sense of responsibility is a trait sought after by more and more office managers. There can be no question that typewriting teachers should attempt to develop this trait.

Finally, employers are increasingly concerned about the ability of typists to work harmoniously with others. Automated offices very often contribute to tensions; and there is growing concern about the capacity of typists to minimize such tensions in the interest of occupational rapport. Managers admit very frankly that automated equipment is highly impersonal; and highly sensitive typists often dislike the automated atmosphere. Typewriting teachers should take steps to acquaint future office workers with some of the problems associated with highly mechanized offices.

While recent legislation suggests golden opportunities for training office typists, there are still many problems attendant to the successful preparation of office workers. As teachers become more familiar with the changing office scene, there is no doubt that the potential opportunities envisioned will, in fact, become wonderful realities.

## 10. Ten "Musts" for Advanced Typewriting

**JOHN C. PETERSON,** The University of North Dakota, Grand Forks

Advanced typewriting courses are apparently in a state of transition. These courses are offered in many areas under the title of advanced typewriting. In other schools, the content of this subject is offered in various office practice courses. Many business educators believe the preparation of vocational typists requires more than one year of typewriting instruction. However, advanced typewriting courses have been under fire by some administrators and business educators largely because such courses have been little more than a repetition of first-year typewriting with too little addition in subject content and skill development.

The content of advanced typewriting, regardless of course title, can be justified if the emphasis includes those phases of vocational office work not provided in first-year typewriting courses that are either general or personal use in nature.

The increasing emphasis placed on personal typewriting courses has somewhat altered the content of beginning typewriting without a corresponding consideration being given to the changing needs of vocational typewriting. The increasing demand for workers trained in clerical activities, together with the opportunity to prepare adequately at the high school level for clerical work, necessitates that teachers of typewriting inventory current vocational typewriting offerings. Teachers must include those aspects of vocational typewriting essential to the further refinement and preparation of office typists.

It is assumed that students in the advanced typewriting course have completed satisfactorily a one-year course in beginning typewriting. Basic content such as manuscript writing, composition at the typewriter, letter writing, and other general and personal uses of typewriting skill have been presented. The advanced typewriting course should build upon these previously acquired knowledges and skills.

There are 10 "musts" for a second-year typewriting course. The inclusion of these "musts" will prepare a more efficient typist for the office of today and tomorrow. Each of these "musts" is presented with a brief justification and elaboration concerning its inclusion in advanced typewriting.

*1. Advanced typewriting should provide a planned program of improvement in basic typewriting skill.* The nature of some advanced typewriting activities contributes to the loss of basic technique. A student attempting to produce a mailable copy of an involved rough draft would, by the nature of the exercise, be deliberate in typing the corrected copy. He would double check the corrections in the original typescript. The nature of the assignment would probably necessitate using a variety of service mechanisms. The exactness of following written notations would also curtail fluent writing. In like manner, certain statistical typewriting activities involve a centering and placement design requiring machine adjustments—all of which slow movements. There are other application exercises also restrictive to the maintenance and development of basic skill.

It is recommended, therefore, that the advanced typewriting course include a definite program of basic skill development. Some teachers provide a week, periodically, devoted entirely to skill development with emphasis placed on the improvement of basic speed and accuracy. Other teachers take two days each week for skill development, using the remaining three days for production activities. There have also been successful courses where teachers have used a portion of each daily period for the development of basic skill. Whatever plan is used, it is important that a planned program of skill building be instituted so that basic skill standards can be raised to at least a minimum of 50 words a minute on new material for five to ten minutes with a quality error tolerance.

2. *Advanced typewriting should incorporate training in electric typewriting.* Over 50 percent of the typewriters now sold are electric machines. It is true, also, that businesses are purchasing electric typewriters in greater percentages than schools. Disregarding the relative merits of electric and nonelectric typewriters for teaching efficiency, the fact remains that there are more nonelectric typewriters in the classrooms than electrics.

A student entering the office occupations will be more adequately prepared if he has had an opportunity to prepare typewriting assignments on an electric typewriter. The amount of this training will necessarily depend on the number of electric machines available. If there are a limited number of electric typewriters in the department and if there is a choice as to where these machines should be used, it is recommended that students in vocational typewriting be given first choice in using the electric typewriters.

3. *Advanced typewriting should emphasize the development of competency in number and symbol typewriting.* Much has been written concerning the effect of office automation on business education. Increasingly, data processing involves considerable number typewriting. As this type of work becomes more common, it is imperative that advanced typewriting provide a planned program for developing touch number writing skill. Clerical work is increasing and justifies more attention to developing number and symbol typewriting. Clerical typists frequently deal with numbers as a part of their "stock in trade." Clerical and automation activities require a high degree of accuracy; it is important, therefore, that high standards of accuracy and speed in number writing

be developed. Acquiring a touch skill for selected symbols should be emphasized, particularly for the $, #, and % signs.

4. *Advanced typewriting should include sustained timed writings.* There is some evidence to indicate that one-, three-, and five-minute timed writings are widely used for the development of basic typewriting skill and also as a method of evaluating the progress of students. A further reason for justifying use of these shorter timed writings in typing classes is the fact that office workers seldom type for sustained periods of more than five minutes; there are countless interruptions in most offices—the telephone must be answered, something must be checked in the files, or a caller must be received.

Many employment agencies, including civil service, may use a ten-minute writing to evaluate a prospective employee's skill. As the advanced typewriting course progresses, students should have an opportunity to take some ten-minute timed writings to be better prepared for employment testing.

5. *Advanced typewriting should add the production factor to application understanding.* A frequent criticism of beginning typewriting courses is that students may be presented with a variety of methods in setting up letter styles, tabulations, reports, and business forms. Most typewriting textbooks include a variety of methods and formats, and teachers sometimes feel that everything in the textbook must be presented. As a result, the students become confused in that they acquire a considerable amount of superficial knowledge without mastering any one method thoroughly.

In advanced typewriting, special emphasis should be given to the production of letters, tabulation exercises, and other phases of office typewriting at employment levels of skill. This is a plus factor that should be included in vocational typewriting. Vocational typewriting involves more than an acquaintanceship with multivaried methods of application. Students must know the most widely used methods of typewriter application, but they must also perform these activities at suitable rates of speed and in mailable form. This necessarily involves considerable timed repetitive production in the refinement of major office typewriting duties.

6. *Advanced typewriting should incorporate a mailability responsibility.* Stenographers are not the only office workers who type letters or business forms. The manner in which the concept of mailability has been delayed until the formal stenographic transcription course would indicate, however, that the term "mailability" was the sole prerogative of the transcription teachers. Developing the concept of mailability is the

responsibility of all business teachers preparing students for the office occupations.

Each vocational typewriting assignment should be evaluated in terms of, "Is it mailable?" Advanced typewriting students should be informed of classroom (and office) mailability standards. To promote the concept of mailability, it is necessary that error correction such as erasing, crowding, and spreading be stressed and perfected early in advanced typewriting. Students should be responsible for detecting and correcting their own errors through special attention given to perfecting proofreading excellence; students might well be expected to proofread the period's production as homework.

7. *Advanced typewriting should provide experience in placement.* Letter centering guides and tabulation formulas are taught in all typewriting classes at the University of North Dakota; the students develop an appreciation and understanding of correct centering and placement. They learn also that there is a preferred method of displaying production typewriting.

When students work in offices, however, they may not remember the centering formulas for arranging material. Teachers must, therefore, provide adaptations to the traditional methods of displaying typescript. This can be accomplished by including projects in judgment letter placement using the uniform line length. In addition, students are provided with practice in displaying other office typing (memos, tabulations, envelopes, and the like) through the use of judgment, intuition, and eye-mindedness. Special emphasis in advanced typewriting should be given to the intuitive placement of production activities.

8. *Advanced typewriting should include a planned program of typewriting from live dictation.* Not every memo or letter in the office is transcribed from shorthand or the voice-writing machine. Increasingly, typists take dictation directly at the typewriter. A planned program of typewriter dictation is a must in advanced typewriting. It should proceed from the simple to the complex by beginning with short phrases and progressing to complete sentences, paragraphs, short letters, and eventually to long letters.

A variation of typewriter dictation would be to assign students in pairs and have them dictate to each other. Not all of the material in typewriting textbooks need be copied; some of it might well be dictated.

9. *Advanced typewriting should develop the ability to plan, budget, and typewrite vocationally for sustained periods of time.* Most typewriting classes are less than an hour in length, the average being approxi-

mately 45 minutes. Much typewriting instruction centers around completing the daily lesson assignment—a totality, a unit complete in itself. This practice seldom exists in an office, however. Typists are usually assigned the day's work at one time and then are expected to have completed this work several hours later. The office typist must plan and budget his time in order to realize the completion of the entire assignment at a designated time. Seldom does the employer give directions for one assignment at a time; he has other things to do than to wait for the completion of each individual job.

It is not recommended that teachers revert to the former weekly budget plan in advanced typewriting, but it is suggested that a few "budgets" be given at which time the teacher would present the directions for eight or ten hours of typewriting production. He might spend the entire period in presenting the budget assignment. The students would then have the responsibility of completing the assignment eight or ten periods later depending upon the length of the "budget." Employers justly criticize our graduates when they state that beginning office workers have difficulty in performing a day's work without constant supervision.

*10. Advanced typewriting should promote adaptability in the office.* Teachers employ a definite pattern of authoritarian teacher direction, demonstration, and supervision. Although probably necessary to developing a motor skill, this method of instruction oftentimes results in students' developing parochial attitudes concerning typewriting form and style. This occurs because teachers have inflicted upon students their personal preferences as to favorite letter styles and other phases of typewriting usage. They may have written a master's thesis and are completely dedicated to that one style of footnoting. Students should be informed that the usage presented in the typewriting class may be one of many acceptable forms. It is imperative that teachers provide for adaptability. One method of developing this important trait is as follows:

The teacher should obtain a current collection of two or three hundred actual business letters. The student might supply the letters or the teacher could collect his own. From this letter collection he can present a number of bulletin board displays. One display might show 10 different ways of indicating reference initials; another display might show 10 different paragraph indention lengths; another presentation might show double-spaced letters (and the teacher has always stated that the double-spaced letter should never be used). These bulletin board displays can show dramatically that there is probably no one uniform method of doing a single thing in typewriting. The students will be more adaptable and the teacher may be the wiser, too.

The "musts" presented here identify some important and selected phases of vocational typewriting instruction. Some of the recommendations may possibly be included in beginning typewriting, but vocational typewriting should emphasize these competencies additionally. The content of advanced typewriting is sufficiently varied and comprehensive in scope so as to justify the dignity of a separate course offering whether it be titled advanced typewriting or given some other course name.

## 11. Preparing Typists for Modern Offices

**BARBARA MARTING,** Columbus High School, Columbus, Indiana

On a recent visit to successful business organizations, I learned that the modern office is a rapidly changing place and that the demands of offices are both vigorous and diversified. Personal interviews with businessmen in the industries visited produced interesting revelations concerning qualities preferred in office workers today.

The businessmen stated that, although it is important for office workers to know how to type letter styles, manuscripts, and tabulated reports, they should also possess essential skills in other phases of office work to enhance their employment potential. An increase in the demand for office workers possessing qualities of better personal judgment and a higher level of responsibility was definitely identified.

Many businessmen suggested that a renewed effort in teaching be made to develop within students preparing for offices the following: (a) The ability to handle oral and written instructions; (b) The ability to handle materials efficiently, to plan and organize work; (c) The ability to work under pressure with minimum loss of time; (d) Versatility—the ability to adapt to changing work demands; and (e) Responsibility—a sense of personal involvement in the success of the company.

These factors present challenges to all typewriting teachers who are interested in preparing students for entry into modern offices. Either students will get this training in our typewriting classrooms or businessmen will look elsewhere for their workers.

Teachers of typewriting must be certain to stress the development of desirable work habits and attitudes as well as high operative skill when preparing students for office positions. The following suggestions are a few that might be followed by teachers interested in training students for successful experiences in industry:

### Verbal and Written Instructions

Office workers must know how to follow instructions—not always short, telescoped ones; but often long, quite complicated ones. In addition, businessmen want office workers to rely upon their own initiative and knowledge when doing a job and not to rely on help from the employer or co-worker.

Like any other skill, learning how to remember and follow directions is the product of systematic, continuous emphasis. First, require students to jot down *all* directions on a sheet of note paper; then, in time, gradually eliminate the handwritten requirement. When required to perform with ever-diminishing cues, students will eventually learn to recall specific and general directions from memory and will produce effectively.

Though teaching students to follow instructions is a difficult task, it looms as one of the most important for all typewriting teachers. Considerable attention should be directed to developing individual procedures for enriching this trait, and measurement in typewriting should require typists to reveal competence in coping with varied and complex directions.

### Handling Materials and Supplies

In all typewriting classes, greater emphasis should be placed on the organization of work and on the economical use of supplies and equipment. Businessmen want students who exercise good judgment and who can mentally plan a project before it is started. There is no place for trial-and-error or "second-chances" in reputable offices.

Insist upon efficient use of paper, supplies, and business forms in problem typewriting. Stress the relationship between full wastebaskets and rising office costs. And, occasionally, take time out to discuss the meaning of "the cost of maintaining a typing station." In each class, make the efficient, economical use of materials a goal of instruction either through activities geared to the entire class or through personal contacts with those students needing individual help in acquiring this essential quality.

Let's give timings on problems requiring the handling of materials; for example, time the assembling of carbon packs, erasing and correcting mistakes, and time movement from one problem to another. Constant emphasis will make students cognizant of the need for efficient methods of organizing supplies and handling materials and will result in greater office potential.

### Working Under Pressure

The businessmen stressed the need for typists to be able to work vigorously until a job is completed and to work for long periods without losing interest or wasting valuable office time.

Too many employers have pointed the finger at typists, from our schools, who profess to have usable office skills but who are totally lacking in the capacity to produce acceptable copy under the pressure of time. In modern offices, time means money; and economy-minded businessmen insist upon productive typists.

To teach students to work under pressure, typewriting teachers should insist upon problems being typed under timed conditions. Students should be forced to make decisions under time; and those decisions should be evaluated quite critically. Typists should be taught how to correct copy skillfully rather than encouraged to retype unacceptable work. (High skill in squeezing and spreading letters is a must for correcting copy effectively.)

The attitude that students are overworked when required to work under timed conditions should be dispelled; and teachers should instill the notion that office work means "work."

### Versatility

The modern office requires typists to be able to adjust to changing conditions and to be able to handle various typewriting jobs. There is no place in offices today for mere copyists; instead, typists must possess high basic skill and thorough knowledge of basic problems, both of which may be transferred to office demands generally new or unanticipated.

To help typists acquire this important trait, teachers should insist upon thorough learning of fundamentals in all typewriting classes and then require students to cope with problems that are novel, new, or somewhat unusual as the level of training advances. At all events, teachers should be certain that their students do not register dissatisfaction or great loss of skill when other than routine problems are encountered.

### Responsibility

Office workers in the future must possess a wholesome interest in the general welfare of the organization for which they work. They must be willing to accept consequences for the work they do. The frequently encountered classroom attitude that "someone else can find the mistake" has no place in modern office activity. Students must be taught to appraise what they have done and to make whatever adjustments need to be made in order to render all activities completely acceptable to the employer. Teachers of typewriting can do much toward developing a fine sense of responsibility by teaching "responsibleness" rather than penalizing students for the lack of that trait.

Modern offices require skillful typists possessing personal and professional maturity. Teachers face a real challenge when attempting to fashion "maturity" out of immaturity; yet it is imperative that this should and must be done. The extent to which classroom teachers demonstrate their abilities in producing workers capable of meeting the demands of modern offices will determine, in large measure, the degree to which businessmen in the future will continue to look toward the school as a source of continued supply of employees.

## 12. Applied Practice Projects for Typewriting Classes

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The routine of day-to-day work in advanced typewriting classes often reaches low-ebb as the student approaches the fourth semester of instruction. Textbooks and their usual rather staid approach to the problem of providing problem materials that represent office situation projects may have become uninteresting and lack luster to many students. The business teacher will find a real challenge in locating and presenting new materials to the student that will combine application, skill, interest, and motivation.

A procedure which may be used to provide challenging problem situations is that of typing materials for other teachers and for the school administrators. The advantages and disadvantages posed by this procedure are limited only to the extent that the teacher can be effective in controlling the problems created in implementing and administering the program. Another procedure is one in which the teacher creates projects for the typewriting class. At first this may sound like a very difficult task, but when analyzed in the simplest form, an easy, logical sequence of problems can be arranged. As an initial step for preparing original problems, consider some of the following criteria as a point of departure:

1. What should the student gain from the projects?
2. What does the student have to work with that is readily available?
3. What series of projects could be done that would have continuity?
4. Will the projects be of sufficient original value as to have meaningfulness (as compared to actual-on-the-job assignments)?
5. Will the student be challenged to employ his personal resources and creativeness in the preparation of the projects?

A successful series of applied-practice projects in advanced typewriting classes is described in the projects that follow:

### PROJECT 1–Index Cards

Local telephone companies may be able to furnish the school with out-of-date telephone directories (maybe even current ones), or the business teacher may collect copies from friends, students, and other teachers. Once a collection is made, the directories should be saved for other classes and for succeeding years. Each student should be provided with a directory—they need not all be alike. Technically, the data in the directory may be out of date, but the basic information will be as good five years from now as it is today.

*Directories.* Provide each student with a directory and at least 50 plain white 5 by 3 index cards (6 by 4 cards will also be satisfactory). Type the name, address, and telephone number of 50 persons or business firms, one each to a card, in index order form. (Example: John J. Jones is typed: Jones, John .) Arrange the cards in alphabetical sequence. The student retains the cards and all projects that follow until the completion of all assignments.

*Purpose.* To process from an original date or information source the typing of names onto index cards; to develop skill in handling smaller than standard size stationery; to utilize a basic skill in alphabetizing.

### PROJECT 2–Columnar Materials
### With Multiple Carbon Copies

*Directions.* Prepare a master list with multiple carbon copies of the 50 names, addresses, and telephone numbers on the index cards in Project 1. Provide the student with bond paper, onionskin paper, and carbon paper. Arrange the information in columnar form in any attractive manner the student chooses; select an appropriate job title. A suggested job title might be "Master Mailing List" or "Catalog Mailing List."

*Purpose.* To process information from index cards into multiple carbon copies; to handle and prepare multiple carbon packs; and to prepare original materials in columnar form. (NOTE: If only manual typewriters are available, have the students prepare an original and four carbon copies of the names, addresses, and telephone numbers. If electric typewriters are available, prepare an original and nine carbon copies.)

PROJECT 3–Interoffice Memorandum

*Directions.* The teacher should prepare by the "ditto" process an interoffice memorandum in handwriting–this memorandum will serve as a cover letter for the distribution to several company officers of the lists prepared in Project 2. The suggestion is made to the teacher that the "ditto" handwritten memorandum which the student will type includes corrections, scratch-outs, and other rough draft notations. Have the student type as many copies of the memorandum as the number of copies of the list made in Project 2.

*Purpose.* To prepare an interoffice memorandum with multiple carbon copies from handwritten rough draft; to indicate the use of a cover letter.

PROJECT 4–Mimeographed Form Letter
With Fill-in Materials

*Directions.* The teacher should prepare in advance a "ditto" rough draft copy of a form letter–either handwritten or typewritten–to be prepared for stencil duplication. Give each student a copy of this rough draft of the letter. The student will need stencils, cushion sheets, typing film, and correction fluid. Instruct the students to prepare first a typewritten "dummy" copy to be followed by the typewritten stencil. Be sure to omit the date line, inside address, and the salutation on the form letter. (NOTE: If the teacher wishes, this letter is a wonderful opportunity to have the student prepare a stencil with the justified righthand margin. One or several stencils may be duplicated or each stencil may be reproduced. Duplicate sufficient copies of the letter so that each student may have a minimum of 50 copies–one for each name in Project 1.)

*Purpose.* To prepare "dummy" copy materials from rough draft copy; to type a stencil of a form letter; to become accustomed to working and arranging materials within the confines of a stencil; to learn to make corrections on a stencil. An alternate objective is to learn to justify righthand margins if this is included in the project.

### PROJECT 5—Typing Fill-in Items on Duplicated Form Letters

*Directions.* Give the student a minimum of 50 copies of the form letter duplicated in Project 4. From the index cards (Project 1) or from the list made for Project 2, have the student fill in the name and address of the person or business firm; fill in the appropriate salutation and also the current date.

*Purpose.* To develop skill filling in information on the duplicated form letter from an original source such as the index cards; to develop a skill in choosing and selecting an appropriate salutation for a letter; to develop skill in manipulating the special keys and levers on the typewriter that will be employed in making the fill-in for the letter—alignment and spacing.

### PROJECT 6—Addressing Envelopes

*Directions.* Provide each student with a minimum of 50 envelopes. From either the index cards, the master mailing list, or the duplicated form letters, have the student address an envelope to each individual or business firm. (NOTE: An excellent opportunity is provided to practice chain feeding of envelopes, and also an opportunity is provided to fold and stuff envelopes.)

*Purpose.* To provide the student with the opportunity to develop skill in addressing envelopes in quantity. Incidental skills to be developed are to use smaller than average or standard size stationery; to manipulate the index cards and the envelopes; and to operate special keys and levers of the typewriter which are reserved for special uses.

When all of the projects have been completed, the teacher may collect them and evaluate them in any number of ways. A point system for each project may be accumulated into a final score and eventually converted to a letter grade value. Upon occasion, no grade need be given as the entire series of projects may be classified as a learning experience and not as an evaluating one.

The successful employment of the preceding projects has been carried out in several advanced typewriting classes over the past years. The greatest benefits derived seem to be that the students gain a practical type of experience in typewriting since the materials closely parallel actual typewriting situations, and the students are intensively motivated by the projects.

## SHORTHAND AND TRANSCRIPTION

# 13. On These Things We Agree in the Teaching of Shorthand and Transcription

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While controversy is more exciting and stimulating, it is good on occasion to note our agreements, using them as a temporary base, a camping ground, from which to initiate probings and examinations. While literally nothing can be mentioned that will be agreed to by all teachers of shorthand, an examination of several hundred current books and periodicals indicates that the following principles and procedures are subscribed to by most. Of course, agreement now does not mean agreement five years from now. It is interesting to speculate which of the following will be removed from the listing as further research and study change our thinking. Space dictates that this list be selective; possibly many of you would have chosen to cite others.

### Principles of Skill Building

*1. Learning is most rapid when motivation is strong and consistent.* When the learner is earnestly intent on the mastery of shorthand for ends that he conceives to be of importance, the best possible setting exists for learning. Intrinsic motivation is superior to extrinsic motivation, but it is sometimes essential to use external incentives to induce the student to learn.

*2. Intense effort is usually required to make a forward step.* Making the right use of tension and determining how fast to push ahead is a vital teaching problem. Undue forcing can cause a breakdown of established patterns; but under conditions of deliberate forcing, the learner may, for example, discover new and improved patterns of writing. A skill should never be forced or strained until it is established.

*3. Concentration must be first upon the pattern of action or behavior rather than the results.* The emphasis upon habits—such as fluency in writing rather than precision of outline—draws for its support upon this principle. The decision to check but not grade early transcripts is another means used to direct attention to the process rather than the product.

4. *Distributed practice is more effective than massed practice.* "Cram sessions" are always inefficient in learning a skill because they do not give the time factor a chance to operate.

5. *Variety in classroom activity is essential.* Because repetition is mandatory in skill learning, monotony and fatigue can become powerful deterrents to progress. Careful planning will help to supply the best variations in procedure.

6. *Learning steps should proceed from the familiar to the unfamiliar and from the simple to the complex.* Although interpretations of this principle vary a good deal, there seems to be quite general agreement, for example, that early writing and transcription should be from familiar material and that students should be slowly guided to more difficult tasks.

7. *All or as many as possible of the elements to be perfected in the entire learning process should be included in the learning situation from the beginning.* Most of us agree that early reading and writing should be from contextual materials, rather than isolated words. Our emphasis upon reading and writing sentences and paragraphs from the beginning stems from our belief in this principle.

8. *Whole or part methods appear to be varyingly effective under different circumstances.* It is generally conceded that both the whole and part methods play a significant role in learning, but many of the most controversial issues seem to center around these two methods. For example, it is sometimes recommended that words should be taught as wholes, but most teachers use the parts approach when they require students to spell. Advocates of early writing and transcription often defend their position on Item 7, which is closely related to the "whole" approach. Moving step-by-step from reading to writing to transcription is based on moving from the simple to the complex, actually a parts approach. The most efficacious size for the learning "whole" appears to be the crux of many of our disagreements.

9. *Transfer of training takes place where like elements exist.* Copying from plate (using visual stimuli) is a poor substitute for dictation and has little transfer to the act of writing dictated material (using auditory stimuli). When tapes are employed in place of copying practice, or when students attempt to dictate the material aloud as they write, stronger possibilities for transfer from the homework assignment to actual dictation may be expected. Many of the disagreements concerning word lists and theory tests seem to relate to transfer.

10. *Students must have goals and they should be reasonably easy of attainment.* Good skill teachers are constantly checking on some aspect of the student's skill. Many subgoals, rather than a single terminal goal, involve continuous evaluation. As soon as one goal is reached, a new one must immediately be set, but not without ensuring that the student savors his present successful effort. Lengthy testing periods are infrequent, but short check-ups occur daily.

11. *Good teaching procedures teach students to teach themselves.* The student who understands the goals for each type of practice, who knows his strengths and weaknesses, and who has been helped to develop good practice procedures is a more intelligent and rapid learner.

## Teaching Practices and Procedures

### *I. Theory*

12. *Although major emphasis is placed upon shorthand theory in the first semester, continual reviews are necessary throughout the program.*

13. *During theory presentation, lusty class drill is a keynote to learning.*

14. *A good reading program is essential to shorthand skill development.* Since reading ability is the precursor of rapid and accurate transcription, a good deal of emphasis is often placed on shorthand reading ability. Whether or not the reading approach is used, most teachers seem to agree that students should possess good reading skill.

15. *Spelling of words is a helpful device in the learning of shorthand.* Although degree of emphasis and the length of time spelling is continued will vary, students generally do some spelling in early stages, thus providing emphasis upon shorthand as a sound language and upon mastery of the shorthand alphabet.

16. *Response to brief forms should be automatic.* There is evidence that overlearning of brief forms is a common teaching practice. Hillestad[1] found that less than 4 percent of brief forms were incorrectly written during continuous dictation of ordinary business materials as compared with 16 percent error on words constructed according to shorthand principles. Because brief forms comprise such an impressive portion of shorthand dictation material, they deserve concentration, although the possibility of overemphasis has been voiced.

### *II. Writing Skill*

17. *The teacher writes well-proportioned and fluent outlines on the chalkboard in profusion during all stages of skill development.* It is gen-

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[1] Hillestad, Mildred. *Factors which Contribute to the Difficulty of Shorthand Dictation Materials.* Doctor's thesis. University of Minnesota, 1960.

erally agreed that demonstration is a prime method in skill development, and by teaching with "chalk in hand," the teacher makes one of his finest contributions to the learning process.

18. *Dictation should begin as soon as writing begins and timed dictation should begin soon thereafter.*

19. *The purpose of the dictation should determine the rate of the dictation.* All involved should understand whether dictation is for speed building, transcription, precision of outline or whatever, and the purpose should govern the rate. Dictation for transcription, for example, should be given 10-20 words a minute below students' shorthand dictation rates. Dictation speed practice on familiar or previewed matter should exceed the expected rate on new materials by a margin of 20-40 words..

20. *Speed development is not just a matter of more and more dictation.* Repetition in and by itself will not result in increased speed. Speed increases only as one's automatic vocabulary increases and one's ability to evoke a more rapid writing response on unfamiliar material (word-building power, however that may operate) improves.

21. *New matter dictation for skill building should be generously previewed.* Teachers vary in the preview techniques they employ, but there seems to be agreement that about 7 to 10 percent of the low-frequency words and shorthand phrases should be reviewed before the initial dictation.

22. *Although most new materials should be previewed, the postview may occasionally be employed with success.* While we are not in agreement as to how the competence for writing unfamiliar words is developed, we do agree that at times other than during testing periods, students should have the opportunity to perfect a method of attack upon the less common words. A review of infrequent words or student-requested outlines *after* the initial writing of the material is a method employed in most classrooms.

23. *All students should experience some writing when their speed is forced.* As students show readiness for rate challenges, opportunities should be provided where they can reach out for new speed levels through forcing. Students' notes are less than their best, but they keep writing no matter how rapid the dictation. This practice is characteristic of almost every accepted speed-building plan.

24. *After speed has been forced, there should be a dropback to controlled writing.* Beneficial effects of this practice include both the encouragement of precise forms and the confidence and satisfaction students feel in recording the entire take.

25. *Dictation speed is effectively developed through repeated short takes, liberally previewed.* Shorthand teachers are all familiar with the spiral speed-forcing plans, such as Blanchard's Pyramid Plan, Flood's Weekly Step Plan, Grubbs' Stair Step Plan, and Leslie's One-Minute Plan. Although the short, repetitive take has occasionally been questioned, it appears that teachers of shorthand generally agree on its effectiveness.

26. *During the speed-building phase of the course, a dictation test (three- or five-minute) given every two or three weeks should be sufficient to determine growth.* To spend a major portion of class time "teaching, not testing" is a time-honored admonition, although many teachers still spend a large proportion of their class hours in the testing process. Besides usurping valuable time, the testing process, if employed to excess, can be discouraging to students who fail to show progress. There is also a consensus that dictation tests should be given at 10-word-a-minute increases rather than 20-word-a-minute increases, thus permitting short-term goals and more frequent recordings of improvement.

27. *Tapes and records should be employed for supplementary dictation practice, but they never replace the teacher.*

28. *Office-style dictation is a terminal activity introduced only after students are producing mailable transcripts at acceptable rates.*

### *III. Transcription*

29. *Transcription must be taught, not just timed.* It is recognized that the transcription process is a complicated one involving shorthand, typewriting, spelling, the forming of possessives and plurals, syllabication, capitalization, compound words, interior and final punctuation. All of these knowledges and skills must be blended under pressure into a usable product to be evaluated not with the school standard of 70 percent but with the office standard of 100 percent. Unification of the various skills mentioned requires the highest order of teaching skill.

30. *A significant relationship exists between correctness of shorthand outlined and accuracy of transcript.* This is perhaps the most disputed of the items mentioned, but there appears to be some evidence that a correlation exists between the correctness of outlines and the accuracy and speed of transcription. Although teachers will attest to the fact that there are many exceptions, the Jester[2] and Fermenick[3] studies support this

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[2] Jester, Don. *A Time Study of the Shorthand Transcription Process.* Doctor's thesis. Evanston: Northwestern University, 1959.

[3] Fermenick, William F. *An Analysis of the Relationship Between Applications of Some Principles of Shorthand Simplified and Errors in Transcription.* Master's thesis. Mankato: Mankato State College, 1959.

view. The methods employed by teachers to develop correctness of outlines vary widely.

31. *Particular attention must be directed to nontyping activities in the teaching of transcription.* According to the Jester[4] study, only 38 percent of the transcriber's time is actually spent in typing. This points up the importance of stressing the non-typing activities.

32. *Except in the initial stages, the mailable transcript produced at a reasonable rate of speed should be the standard of achievement.* There appears to be almost unanimous agreement on this item by teachers of shorthand. No mutual understanding is evident, however, on what constitutes a reasonable rate of speed during various levels of transcription training.

### *IV. Standards and Testing*

33. *All shorthand tests should contain the element of speed and should, therefore, be timed.* In order to permit the greatest possible transfer, it is generally recognized that all tests—vocabulary, reading, transcription, as well as dictation tests—should be given under timed conditions. Although there are variations in the type of testing which is done, the timed check-up of one kind or another is generally accepted.

34. *First-year shorthand students should be able to record new material of average difficulty dictated at a rate of 60-80 words a minute for five minutes.* Although there is a growing use of the three-minute timing, the most commonly accepted standard for first-year shorthand students is based on the five-minute test. We agree that several tests should be passed at each speed level before students are permitted to move to the next higher dictation rate.

35. *One hundred words a minute should be the speed requirement for the advanced shorthand class.*

36. *Definite intermediate standards, as well as end-of-semester standards, should be established.* Two antithetical schools of thought exist regarding intermediate shorthand learning symptoms. The particular standards which are employed will, of course, be closely related to the philosophy which is held. Agreement comes in believing that there must be signposts all along the learning route which help to tell students how well they are doing and the teacher how well he is teaching.

It should be forbidden to express any thoughts about shorthand instruction without mentioning the vital role of the teacher. We certainly agree that teachers have a responsibility for possessing a vocational shorthand skill polished and sharpened for demonstration, for preparing detailed and careful plans, for spirited pacing of the class, for carrying on action research, for continually examining all methods and procedures used to find better ones, and for personalizing instruction by caring, encouraging, cajoling, applauding, analyzing, admonishing, tending, and individualizing.

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[4] Jester, op. cit.

Although we must continue to explore the science of teaching shorthand, the artistry of teaching shorthand will always be in evidence in classrooms where students excel. On this we must surely agree.

## 14. An Eclectic Method for Developing Transcription Skill

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A method has been defined as "a group of compatible devices directed toward a desired objective." "Eclectic" means "choosing from various sources or systems according to taste or opinion."

From these combined definitions, associated with the word "transcription," it can be deduced that an eclectic method for developing transcription skill is a series of techniques or devices or ideas "snitched" from other sources and applied toward a prescribed objective in a logical sequence of activities. When directed toward the ultimate goal of producing mailable copy with speed and accuracy, these activities should result in a natural, almost intuitive, performance of the skill.

Whatever the method used, it must adhere to the basic psychological principles of skill building so that the student progresses "painlessly" from one step to another without being obviously aware that he is putting forth added effort. To accomplish this transition, a good method must—

1. Tie the new learning in with something familiar
2. Be as simple as possible at the beginning, and then proceed to the more complex
3. Be fun—interesting—but at the same time, challenging and stimulating
4. Provide variety in such a way that new practices contain many of the components of the previous ones
5. Make the student feel successful—that he is progressing with each step.

These requirements of a good method can be realized by developing beginning skill in short spurts using easy material; coordinating these short spurts into longer ones while retaining the skill; and then progressing to more difficult material and sustained skill. The eclectic method embodies these criteria.

Any discussion of a method for developing skill in any area must take into consideration two concomitants—building the skill and then forcing that skill.

*Building Transcription Skill.* The fundamental factors that are basic to building transcription skill revolve around the everyday activities that take place in our classrooms. These activities are those that are concerned with the learning, the refining, and the perfecting of the knowledges, along with their related uses, that make up the skill.

Teachers must teach and students must know and write "good shorthand." This means overlearning and overteaching the principles and theory found in the shorthand textbooks of today as suggested in the teacher's handbooks and the methods textbooks in the field. It means students of shorthand must instantaneously associate sounds with symbols, and just as instantaneously combine these symbols into legible shorthand outlines. A student cannot hear the word *team,* write *j e m,* and expect to read the word *team* with any degree of success. If a student cannot read the outline he has written, how is he going to transcribe it?

"Good shorthand" also means the spontaneous recall of the recommended outlines for a large segment of the most commonly used words and phrases. This calls for an almost kinesthetic response to the spoken word. It is a logical assumption that if a student knows the correct shorthand outline and writes the correct shorthand outline, transcribing the outline without hesitation will be easier. This spontaneous recall will be aided by the automatization of brief forms, brief form derivatives, and simple phrases.

Immediate improvisation of a recognizable outline for words that cannot be recalled instantaneously is another fundamental factor of "good shorthand." Alert listening and the ability to record a sufficient number of symbols in their proper sequence to identify the word in context are key elements in the art of improvisation.

Good penmanship, as it relates to proportion and fluency, is also basic to "good shorthand" and thus to good transcription.

The fundamentals of grammar, punctuation, spelling, and syllabication are also basic to building transcription skill. They must be reviewed and refined until students respond almost intuitively to the correct and most common uses found in the language of business communications.

These, then, are the basic elements of the process of building transcription skill. They must be emphasized constantly throughout the learning of shorthand and the development of transcribing ability.

*Forcing Transcription Skill.* The factors pertaining to the forcing of transcription skill revolve around those activities that are designed to increase and perfect the performance of the skill. These are the activities that center around meaningful, purposeful practice of the skill until the student can perform the skill with speed, accuracy, and the application of related knowledges.

The following activities, which are designed to force transcription skill, make up the eclectic method. They are based upon the philosophy that practices that are good for developing skill in other areas can be used with equal effectiveness in developing skill in the area of transcription. Many of these practices are already familiar as speed development devices in typewriting. Others have been more closely related to the development of skill in sports.

In the eclectic method of developing transcription skill, to paraphrase Abraham Lincoln, you can use some of these activities all of the time, and all of these activities some of the time, but you will not want to use all of the activities all of the time.

This eclectic method can be used as an entity within itself—a sole method for developing transcription skill, or it can be used effectively as a supplement to any of the existing methods of developing transcription skill to provide variety and stimulation. It can be used at any level of instruction by varying the speed of dictation or the desired goals to conform to the level of achievement of a particular class.

### Devices Used All of the Time

*Five Minutes of Machine Transcription Practice at the Beginning of Each Class Period.* Students are instructed to write a certain portion of their homework practice in good, legible shorthand and to begin transcribing from these notes as soon as they come to class. Every student should be working when the teacher enters the room. The teacher sets the timer for five minutes. This practice is usually without pressure, but at times the teacher may wish to direct it, pace it, or emphasize certain techniques that need polishing. This work is not handed in. Checking is done during the five minutes as the teacher goes around the room and observes each student. Machines are set for a 60- or 70-space line with single spacing. Letters are not centered on the page, but the correct format and spacing of the parts of the letter are followed, and the next letter is begun immediately below the previous one. Students may use the same sheet of paper the next day if space remains. Students are encouraged to use the best transcribing techniques at all times and to work constantly for increased speed.

This device has many advantages—the most outstanding being that the student has daily, repetitive practice on transcribing from his own notes. The class settles down without the usual chatter. (They are made to understand that this had better be the situation when the teacher enters the room!) Many of the students get more than five minutes of practice, with only three minutes of the actual class time having been taken up by the activity—assuming it normally takes two minutes for everyone to get started when the usual procedure is followed.

*"Reading In" Essential Punctuation.* Whenever any reading is done, whether it is from shorthand plate, homework practice, or material dictated in class, all essential punctuation is "read in." Students do not identify the reason for the punctuation, as this is covered in other activities. The only time punctuation is discussed during the reading periods is when an error has been made or a questionable punctuation problem arises.

### Devices Used Some of the Time

These are the techniques that substantiate the psychological principles mentioned in the early part of this article. They are mentioned here in the logical order of presentation; however, the first-mentioned techniques can be interspersed later on with the more advanced techniques if it appears the class needs a psychological lift or extra "spurts" of encouragement.

In all these practice activities, students are urged to concentrate consciously on writing their most legible shorthand at all times. Likewise, when transcribing, they are instructed to typewrite at their best controlled speed, using good typewriting techniques—keeping eyes on copy, keeping the carriage moving smoothly, and so on. "Sloppy" practice is not conducive to a finished final product!

*One-Minute Timed Writings—Simple Sentences.* The first sentences selected, usually three each day, are simple, easy sentences, containing approximately 70 strokes or 14 words. They contain no punctuation problems. These sentences are read to the class, one at a time, with timed practice from their shorthand notes following immediately. As in typewriting, three opportunities or timings are given on each sentence, and the best of three timings is noted. All three sentences are read again by the teacher, with the students combining them in their shorthand notes. Three 3-minute timings are then given on the combined sentences for sustained practice. Performance is noted on the best of three.

Students seem to like the 4 three's—three sentences, three timings, the best of three, and 3-minute timings.

Emphasis on accuracy is incorporated in emphasis on "best controlled speed," and when the students' controlled transcription speed on simple sentences approximates their controlled typewriting speed on comparable material, it is time to proceed to the next step.

*One-Minute Timed Writings—Sentences with Punctuation and Spelling Problems.* The procedure followed here is the same as with simple sentences. The sentences selected for this step are longer and contain elements of grammar and punctuation which require thought when transcribing. Three sentences are selected, each with a different punctuation problem—such as an introductory clause or phrase, an apposition, or a compound sentence. (When emphasizing the punctuation of a series, it works out very effectively to include a sentence containing a series of words, one containing a series of phrases, and another containing a series of clauses.) The sentences are read one at a time, but before transcription practice begins, the punctuation rules for that sentence are reviewed and discussed. If a spelling problem is encountered, this is clarified, and the teacher makes a note of the word and adds it to the class spelling list for future recall. Students are not permitted to insert punctuation into their shorthand notes during the discussion. Any notations made while they were writing their notes are acceptable—in fact, encouraged when possible, but one of the objectives of this activity is to develop the ability to think while transcribing and to insert correct punctuation intuitively as the notes are being read and transcribed.

Sentences for this activity can be selected from a number of sources —from textbook material that has already been covered or from material that will be used later in mailable letters. It has been found that the examples given in textbooks to illustrate punctuation rules can be used most effectively in this manner.

The biggest problem connected with using material of this type is that the sentences are of uneven lengths. This makes the figuring of transcription speed more complicated, but this need not be an obstacle. It is a simple matter to mark every four or five words (20 or 25 strokes) and indicate the total number of words in each sentence, as is done in the more recent typewriting textbooks. As it is practiced, each sentence can be written in shorthand on the blackboard by the teacher, using a diagonal dash to indicate every four or five words. Students then use this blackboard notation as a guide when determining their best speed. For the three-minute timings, the teacher merely indicates the total number of words in the three sentences, as they have been left on the blackboard.

This activity should be continued until the most commonly used punctuation rules have been covered and until students transcribe sentences of this type as easily as they transcribe the simple sentences.

*Calling-the-Throw Transcription.* This activity approximates calling-the-throw drills in typewriting. Graduated sentences or sentences of the same length can be used.

When graduated sentences are used, the teacher selects a call-the-throw interval ahead of time. The speeds represented in the sentences selected will be five or ten words above the levels of achievement in the class. The students write in shorthand as the teacher reads the sentences. For this activity, the students are instructed to write across the page of the shorthand notebook. After each sentence is read, the teacher indicates the speed represented by that sentence for the interval selected, and the student records it near the right edge of his notebook. The same procedures or adaptations that are recommended for this kind of practice in typewriting can then be used in forcing transcription skill in shorthand.

If the teacher wishes to decrease the call-the-throw interval, thereby increasing the speed, the students are instructed to indicate this new set of speeds next to the ones already written in their notebooks. This activity, in and of itself, tends to become an excellent motivating factor. The same procedure can be followed if it should be necessary to reduce the speeds by increasing the call-the-throw interval.

When sentences of equal lengths are used, the teacher reads the required number of sentences to make up one or two minutes of practice. For 20-second intervals, this would be either three or six sentences; for 15-second intervals, four or eight sentences; for 12-second intervals, five or ten sentences, and for 10-second intervals, six or twelve sentences. It is recommended that the sentences selected contain either 60 or 70 strokes. The transcription speeds, using the call-the-throw intervals mentioned above, would then be 36, 48, 60, and 72 words a minute on the 60-stroke sentences and 42, 56, 70, and 84 words a minute on the 70-stroke sentences. Students are challenged and stimulated when the call-the-throw intervals are varied and the selected speeds or goals are announced for each practice activity. When students have achieved the speed goals for each exercise, they are encouraged to try to maintain that speed with greater control and concentrate on accuracy and good techniques.

## Other Devices

*Reach-a-Goal Paragraphs or Letters.* This activity proceeds to dictated, connected material. The procedure is to dictate a prescribed number of words, at a prescribed speed, which the students are to transcribe in a prescribed time. The prescribed time is held to one or two minutes. The material usually is unpracticed, although some earlier practiced material can be used if desired.

The objective of this activity is for the students to reach a transcription goal set by the teacher. In previous activities, the concern was with forcing the students' individual transcription rates on untimed, repetitive material. Here the concern is with forcing the class as a whole toward reaching a particular goal. Of course, good shorthand, good transcription practices, and good application of spelling and punctuation are always assumed.

This technique is flexible and allows for variations in procedure. The rates of dictation used and the transcription speed goals selected depend upon the level of instruction of the class. This practice may be varied in the following ways:

Select a paragraph or a short letter containing the number of words chosen as the goal. Select also a speed of dictation at which all members of the class can write legible shorthand. Tell the class that a paragraph or a letter containing so many words, say 60, is going to be dictated at a certain speed, say 80 words a minute, to see how many can transcribe it in one minute. The teacher, in this way, sets a transcription goal of 60 words a minute for the class. Time the students for one minute several times until most of them can reach the goal. Remember, reaching the goal is the main objective—either they do or they don't. The concern is not with individual transcription speeds.

Another procedure is to break longer material down into sections of so many words in a section, according to the goal set by the teacher. Dictate one section and time it for one minute; proceed to the next section and time it; dictate still another section and time it; then combine the sections for longer periods of sustained dictation and transcription timings. Unless specially prepared material is used, the sections are likely to end and begin in the middle of a sentence. If students are prepared and conditioned for this situation, they will accept it and adjust to it without concern.

Another procedure is to tie this transcription practice in with speed building. During the speed building practice, sections of material will be repeated and dictated at varying rates of speed, such as 60, 80, 100, 120, 140 words a minute, and so on. At the end of this speed building activity, determine the rate of speed all students were able to take and redictate the material at this rate. Then time it for transcription practice for one or two minutes. The length of the timing will, of course, depend upon the rate of the dictation. If the rate of dictation centers around the lower speeds, the timings will be for one minute; if it centers around the higher speeds of 100 words a minute and above, the timings will be for two minutes.

Transcription goals should be kept high; but if circumstances are such that the goal is relatively low, the emphasis should then be placed on accuracy and good techniques.

*Transcription Rate—New Matter Dictation.* This activity approximates straight-copy, corrected timed writings in typewriting. It is really the "heart" of this eclectic method of developing transcription skill. Its object is to develop the student's sustained transcription rate a minute on material dictated at a rate which allows for legible shorthand notes.

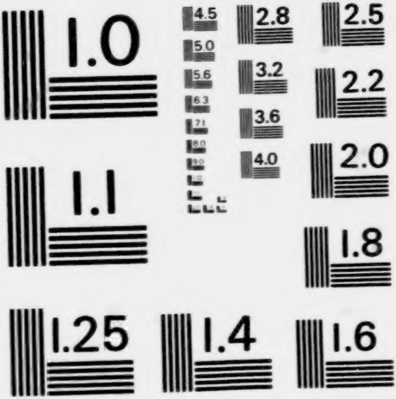
The philosophy supporting this practice is that high-level transcription ability can be developed more readily on straight-copy material than on arranged material, with this ability transferring to arranged material with but a slight decrease in speed.

The end result of this activity, then, is "mailable content." This means errorless copy, with a penalty imposed if errors do occur or have been unnoticed and not corrected.

This activity, like those preceding it, becomes adaptable to any level of instruction through the selection of commensurate dictation speeds and by determining reasonable standards of achievement for a particular level. The procedure for implementing this practice is as follows:

Select a 60-, 80-, 100-, or 120-word-a-minute take, depending upon the level of achievement of the class. The rate of dictation should be at a speed that most students can get with control. Dictate at this speed for three minutes. Students then transcribe these notes immediately, erasing and correcting all known errors. This transcript is double spaced.

The teacher times each student individually to the nearest one-half minute and records his time. This means that if a student's transcribing time is three minutes and twelve seconds, it will be recorded as three minutes. If his transcribing time is three minutes and seventeen seconds, it will be recorded as 3.5 minutes. This simplifies the computation of individual transcription rates, and the law of averages should eventually round out the recorded times. The student is instructed to raise his hand


1.0
4.5
5.0
5.6
6.3
7.1
8.0
9.0
2.8
3.2
3.6
4.0
2.5
2.2
2.0
1.1
1.8
1.25
1.4
1.6

MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A

when he has completed and proofread his transcript. No additional corrections are permitted after the time has been indicated.

These papers are checked in class with the teacher reading back the original dictation. Unerased typewriting errors are encircled and other types of transcription errors are indicated with a check mark. The teacher gives each student his transcription time, and he figures his own individual transcription rate on the following basis: total words in the dictation minus a penalty of one word for each transcription error and 10 words for each uncorrected typewriting error divided by the transcription time. The penalty can be readily determined by deducting 10 for each circle and one for each check. After computing his transcription rate, each student indicates the result of his effort in the upper right hand corner of his paper thus: Rate of Dictation/Transcription Rate/Grade. These papers are handed in, the teacher spot checks them and records the rate and the grade for each student. Papers containing more than five errors of any kind are not accepted.

The following grading plan is suggested for each level of instruction in college. If these rates seem unrealistic for high school students, teachers could adjust either the rate of dictation, the rate of transcription, or perhaps move each semester up one step.

| *Semester I—60* WAM *Dictation* | |
|---|---|
| 25 WAM or over | A |
| 20–24 WAM | B |
| 15–19 WAM | C |
| 10–14 WAM | D |

| *Semester II—80* WAM *Dictation* | |
|---|---|
| 40 WAM or over | A |
| 35–39 WAM | B |
| 30–34 WAM | C |
| 25–29 WAM | D |

| *Semester III—100* WAM *Dictation* | |
|---|---|
| 50 WAM or over | A |
| 45–49 WAM | B |
| 40–44 WAM | C |
| 35–39 WAM | D |

| *Semester IV—120* WAM *Dictation* | |
|---|---|
| 55 WAM or over | A |
| 50–54 WAM | B |
| 45–49 WAM | C |
| 40-44 WAM | D |

Once this practice has been started, it is suggested that it be scheduled rather frequently as a class activity immediately preceding emphasis on mailable letters. Two exercises can be given in one 50-minute class period if students are permitted to transcribe no longer than the time required to meet the minimum standards for each level of instruction. When this is done, it is also possible to include a few minutes of warm-up practice. Any one of the techniques mentioned previously can be used effectively for warm up.

*Mailable Letters.* The final step in this eclectic method for developing transcription skill is on mailable letters. The procedure is to begin mailable letters with a brief review of the fundamentals of letter placement and arrangement.

Several single letters are then dictated and students are timed individually as they transcribe each letter. The speeds of dictation and the length of the letters are commensurate with the level of instruction of the particular class. These individual transcription rates on single letters are then compared with each student's straight-copy transcription rate in the preceding practice. If no more than a 10-word difference exists, proceed to the next step. If more than a 10-word difference exists for the majority of the class, continue working on timed transcription of single letters.

The next step is to dictate two letters and time the students on these to determine their individual transcription rates on more than one letter. When they reach a transcription rate on two letters that is no more than 10 words below the average of their best straight-copy transcription rates, individual timings are discontinued, and office-style practice progresses.

Studies relating to production requirements in business have shown that six to eight average-length letters transcribed accurately in an hour are an acceptable standard of performance. To approximate this standard in the classroom, it is believed that four letters transcribed in a half hour is a comparable standard.

For these office-style practices, four letters are dictated. The speed of dictation and the length of the letters are again determined by the level of instruction. Students are given 30 minutes to transcribe the four letters in mailable form. This practice is then advanced to include making a carbon copy of each letter and, finally, to making a carbon copy and typewriting an envelope for each letter.

The sets of mailable letters in these last three steps are checked and graded. Any grading plan that has been found satisfactory in evaluating mailable letters can be used.

The following dictation speeds and letter lengths are suggested for the various levels of instruction:

| *Semester I* | *Semester II* | |
|---|---|---|
| No work is done on mailable letters this semester | Rate of dictation | 80 WAM |
| | Letter length | 125 words in body of letter |

| *Semester III* | | *Semester IV* | |
|---|---|---|---|
| Rate of dictation | 100 WAM | Rate of dictation | 120 WAM |
| Letter length | 150 words in body of letter | Letter length | 175 words in body of letter |

This, then, is an eclectic method for developing transcription skill.

## 15. Transcription Profits Through "Block of Time" Scheduling

**VEDA A. LONG,** Kathleen Senior High School, Lakeland, Florida

How often have teachers said, "If I just had a little more time, I could do so many more things with my class!" Our expectations, plans, and ideas usually exceed the time we have available. A block-of-time class schedule, such as Plan I for Vocational Office Education for Florida, has been found effective in helping to solve this "time" problem. In this plan, many facets of office education are integrated with the teaching of advanced shorthand—grammar, word usage, business correspondence, interoffice memorandums, and business reports. This correlated approach makes the second-year shorthand student more adaptable to office procedures and routine. In addition, of course, it is an effective way to obtain increased speed and accuracy in taking and transcribing shorthand, since it provides many opportunities to use this skill in practical and realistic situations.

The State of Florida Vocational Office Education, Plan I, requires that three 55-minute class periods be scheduled together in order to provide opportunities for integrating the subjects of business English, advanced shorthand, and office practice, including office machines. Students receive one unit of credit for each of these three subjects. The regular class break is observed in this three-period block of time. Units included in the three-hour block are:

1. Shorthand and transcription skill building, including emphasis on mailable materials.
2. Business English review, including time each day to drill on grammar, spelling, punctuation, capitalization, vocabulary, and the like.
3. Office practice units, including the secretarial procedures units contained in secretarial practice textbooks, as well as an additional unit in automation.

4. Office machine units on the typewriters and arithmetic, calculating, posting, duplicating, and transcribing machines.

### Development of Business English Skills

In studying punctuation, spelling, and grammar, as a part of the total learning in shorthand and transcription, many students feel that they actually learn more English than they learned in previous years, possibly because of numerous opportunities to apply the rules rather than learning them in isolation. One decided advantage to a three-hour block-of-time schedule is that a subject is introduced, interest is created, and discussion continues until definite conclusions and results are reached. The learning is not interrupted by a bell ringing at the end of the period, making it necessary to postpone a discussion until the next day. By that time, interest has lagged and discussion is not as effective as when it is carried to completion in one session.

### Development of Transcription Skills

One of the main problems that shorthand teachers face is sufficient time for students to transcribe accurately and correctly, and in correct form, the letters that have been dictated. Particularly, duration dictation is held to a minimum. Many times when a secretary is taking dictation, the time spent at this task is much longer than the five-minute dictation used in the classroom. It is necessary for students to have an opportunity to take sustained dictation with time to transcribe it in order to determine if they can handle this type of assignment. Many times my students have said to me, "I got the letter, but I just didn't have time to transcribe it." Pressure of time does many things. As one feels a push and a rush before the bell, careless errors creep in that, if the student had time to work through the dictation thoroughly, can be corrected before the work is finished. This does not mean that it is not important to work speedily at the task, but it does give the student a sense of being able to complete a job, even if it means extending the allotted time to finish the transcription. This, in itself, teaches students to complete urgent work before leaving the office at the end of the day, even though the regular working hours may be ended.

Block-of-time classroom scheduling guarantees typewriters for each shorthand student for transcribing. Thus, all equipment in the business department can be utilized to the fullest extent. The work is so integrated that the student often asks, "Will this letter, dictated in connection with a job experience project in office practice, count for a shorthand grade or what?" It is really rather difficult to determine in what area this grade should count.

### Development of Dictation Skills

Another advantage to "block" scheduling is the flexibility it provides. One day a teacher may spend time in speed building by tape, record, or direct dictation; another day, the teacher may spend less time on these activities and give priority to meeting other special needs of students.

In my opinion, it is imperative that a minimum of an hour during the block time be jealously guarded for the purpose of improving and extending the skill of shorthand. No one thing, except typing, can mean so much and be as far reaching in getting a job and keeping that job. It is this ability that makes possible a quicker climb up the ladder of success to a position as an executive assistant. Some ways that help to increase interest in learning shorthand are:

1. Post student progress sheets showing dictation and transcription achievement.
2. Alternate the order of shorthand development during the block of time.
3. Encourage the use of shorthand in homework assigned in business English, office practice, and any other subjects where practical.
4. Transcribe articles relating to special holidays.
5. Keep before the students job opportunities requiring shorthand skills.
6. Study biographies of famous people who used shorthand as a steppingstone to business positions.

Much has been said about integrating subject matter into whole units. I am certain that, when shorthand becomes a tool to be used in accomplishing the goal a student is striving for, it takes on a new meaning for the student. When there is an understanding among teachers, parents, and students about the aims of shorthand, the way the skill is acquired and where it leads, the doors are open for a happier relationship.

### Integration of Units

"Block" teaching simulates actual office situations as nearly as possible. Students are assigned definite responsibilities, generally rotating each two weeks to new assignments. The teacher may give dictation to a student who is acting as "secretary for the week." This is true office-style dictation since the material is legitimate correspondence for the department of business education. This correspondence covers a wide variation of content, such as order letters, inquiries concerning bills, transmittal letters, acceptance letters, thank you letters, and the like. The responsibility also includes such tasks as opening mail, stamping it with the time and date received, and placing it on the teacher's desk in the proper manner. Letters that have been transcribed are placed on the desk for a signature. After the letter is signed, the "secretary" checks to make sure that enclosures are included; she then folds, stamps, and mails the letter. In this way, the student learns the chain of events from writing the first letters, receiving replies, and perhaps following up the correspondence.

Dictation takes many forms other than that found in the usual textbooks. There are memorandums to other teachers, speeches, articles, notes from conferences, telegrams, reservations, and the like.

Another experience for the student is that of taking dictation from different people. We select members of the faculty who have a great deal of correspondence and assign a shorthand student to them periodically to take and transcribe their business letters and communications. We do ask in return for this service that the assigned teacher fill out a checksheet on the student, rating her as to attitude, neatness of work, neatness in appearance, accuracy, promptness in reporting to this assignment, promptness in handling the work, working manner, poise, courtesy, and the like. This particular experience gives the students confidence when they apply for a position and are asked to take a letter from a prospective employer and to transcribe it.

Another advantage of the "block-of-time" scheduling is the opportunity to deal more specifically with the area of human relations. Students must work together for long periods of time to develop the necessary attitudes and skills for harmonious relationships in the office. The day-to-day contact with each other for 180 days, equivalent to a half day on the job, gives students an opportunity to experience the feelings, closeness, acceptances, and rejections which are a part of adjusting to a job and which must be dealt with as they arise.

Block teaching also allows time to hear and discuss secretarial training records directly or indirectly related to taking and transcribing shorthand. These, of course, point up the right and wrong ways for handling situations that might arise in a business office.

In "block" teaching the coordinating of the learning activities that are necessary in the development of the qualities that make a good secretary take careful planning. It is imperative that each student be given an opportunity to experience a variety of activities in order to determine the areas in which she excels. These opportunities also give the student a chance to determine her own aptitude for work and the type of work from which she can gain most satisfaction. It is interesting to discover that some students with the skills and abilities to become secretaries find during this period of training that they simply are not fitted for a job as a secretary. A girl may be quite capable of performing the mechanics of secretarial procedures but be unable to adapt to the many troublesome situations.

### Visual Aids and Other Media

No special time need be allotted for setting up visual aids, for they can be made ready as other work is being completed. This makes it easier and wastes less time in getting ready; thus, we can enrich the program more with films, training records, overhead projector, and controlled reader filmstrips.

As shorthand is one of the most important facets in the training of secretaries, an understanding of its importance can be achieved through field trips. The block of time provides enough flexibility to make it convenient for businesses to schedule field trips and provides enough time to travel whatever distance is necessary for the visit.

Planning and conducting open houses for the parents and other interested community leaders and a luncheon for the advisory committee teach social skills and cooperation among vocational office education students. The advisory committee is the link between the classroom and business. Members serve as advisers in helping prepare curriculum offerings and provide enrichment of training since they know the needs of businesses in the community. Our advisory committee has suggested that an "on-the-job trial" for a week would mean much to the student and give her a "sneak preview" of the world of work. It might also be an open door to a job upon graduation.

### Evaluation of "Block-of-Time" Scheduling

As many things are learned by trial and error, my students were requested to evaluate the block-of-time teaching by answering a number of questions that I felt would give a rather clear picture as to the effectiveness of this plan. Some of the comments include:

1. Need more shorthand—office-style dictation.
2. Opportunity for on-the-job observation was helpful to me.
3. Study of English had more meaning as it related to business correspondence.
4. Covered more learning activities and felt more confident.
5. Learned to get along better with others.

The students are really sold on the idea of "block-of-time" teaching and would complain if we tried to go back to hour-by-hour teaching. We adopted the slogan, "Nothing But Our Best Is Good Enough!"

# 16. Preview Transcription, Too!

**DON JESTER,** DePaul University, Chicago, Illinois

The importance of teaching transcription is recognized by business teachers. Good teachers are always looking for better techniques and instructional devices which will make their teaching more effective. Let us, therefore, consider a device known as previewing. For some time business teachers have recognized the value of previewing shorthand takes. Now let us employ this same previewing technique in the teaching of transcription. Remember, the emphasis is on teaching.

As students transcribe, they face a variety of problems which call for decision making. Such decisions, unless they are made instantaneously, force transcribers to stop typing while arriving at their solutions. If transcribers do not know the solutions to their problems, they must take additional time to consult references for correct answers; or they must guess, thus risking an incorrect answer or solution. The results are slow transcription rates and the possibility of inaccurate copy.

The goal in teaching transcription, then, should be to aid students in making correct decisions and in making them promptly. This goal can be achieved. The previewing technique can make the teaching of transcription both effective and efficient.

Exactly what is meant by previewing transcription? Just as we select the words and phrases in a shorthand take that might give students difficulty, so do we select spelling, punctuation, and typing problems which might give the students difficulty in converting their shorthand notes into mailable copy. Just as we write the shorthand outlines for these difficult words on the board and drill on them before the dictation, so do we write the difficult spelling words, unusual punctuation, and problems of typing style on the board before the transcription period.

The teacher should select the items for the transcription preview carefully. Many of the items can be taken from the marginal or spot reminders found in the textbook, but these should be supplemented with others which the teacher knows will give his particular class trouble.

Difficult spelling words and unusual punctuation are important, of course; but do not overlook the problems of the typewriting style. In this classification of transcription problems fall such decisions as expressing numbers in words or in figures; that is, should it be transcribed *ten o'clock* or *10 o'clock?* The expression of quantities is another style problem; should it be transcribed *75¢, 75 cents, or seventy-five cents?* These problems are also treated in the marginal and spot reminders, but they need additional drill and consideration if students are to learn the preferred forms and understand simple rules which govern correct usage.

With the emphasis on teaching transcription, here is a three-step plan for the use of previews. The plan fits the three phases of transcription training and should be started as soon as students begin transcribing at the typewriters.

*Step One.* In the introductory phases of machine transcription, place the preview on the chalkboard. Review with the class any rules involved for the particular problems presented in the preview. Drill on the words and phrases by having the students type a line of each item. Then leave the material on the board during the transcription period for students to refer to while typewriting from their shorthand notes.

*Step Two.* During the skill development phase of transcription training, place the preview on the chalkboard. Again, review the rules and drill on the words or phrases, typing a line of each item, as in step one. This time, however, the drill should be more intensive, for the material will not be left on the board, but will be erased before transcription begins. In this step, learning must take place if the students are to transcribe correctly. Rather severe penalties should be enforced in the grading plan on those students who make errors on any of the preview items.

*Step Three.* In the final phase of transcription training, when the emphasis is on mailability almost exclusively, the previewing continues but takes the form of reminders rather than new learnings. The previewing becomes entirely oral. The teacher suggests possible problems by saying, "You might need to check the spelling of *recommendation,*" or "Remember how to type *50 percent.*" This oral reminder is all the students gets in the way of help, but it makes them aware of the possible problems. It forces them to think through some of the problems and to make their decisions before they begin to type. It should cause them to look in appropriate reference sources if they do not know the correct way to spell a word or express a quantity.

The previewing technique, if followed consistently, should increase transcription rates and reduce transcription errors. By helping students in this important phase of the transcription process, we can help them achieve higher rates with fewer errors. The ultimate goals of transcription can be realized when transcribers solve their problems quickly and correctly. Using the previewing technique as an instructional device, one can realize transcription goals.

## 17. Helping Students Meet Office Standards in Transcription

**HAZEL A. FLOOD,** Mankato State College, Mankato, Minnesota

"There is nothing new under the sun" could certainly be applied to what we know of quality standards actually maintained by business offices so far as mailability of letters is concerned. Numerous research projects have been reported; many experts have written articles; various surveys of business entrance requirements and opinions of businessmen have been completed. However, the statements of employers do not always agree with letters they actually sign and mail. There does not appear to be a clear-cut list of standards that we might use as a definition of mailability. Nor can we make a definite statement regarding minimum production rates actually required in business.

Factors such as types of businesses, variations within one class, quantity of letters to be transcribed, relative importance of the letter, and level of the consumers for whom the letters are intended influence quality standards of business offices.

In an unpublished study of errors found in 1,000 business letters that had been signed and mailed, the contributor secured the following information:

| | |
|---|---|
| Types of business represented | 21 |
| Total number of firms | 213 |
| Total number of "mailable letters" | 248[a] |
| Total number of errors | 1103 |

---

[a] For the purposes of this study, a mailable letter was defined as one which was clear in meaning and which contained none of the types of errors usually checked in our classes. Typewriting errors included faulty shifting, uneven spacing, and obvious transition errors. Spelling included any variation although there is a possibility that some of the words misspelled were actually typographical errors or errors in word choice, such as *to-too* or *their-there.*

Types of errors:

| | |
|---|---|
| Word division | 649 |
| Spelling | 76 |
| Punctuation | 173 |
| Poor erasures | 21 |
| Placement | 98 |
| Strikeovers | 29 |
| Typewriting | 57 |

Types of offices that appeared to have higher standards were publishing companies, legal firms, some insurance offices, and "exclusive" clothing stores; those which appeared to have little concern with either appearance or absolute accuracy so far as teacher standards are concerned were those engaged in heavy construction work, such as concrete companies and road maintenance.

It is generally assumed that our principal objective in our transcription classes is to develop those knowledges, appreciations, and skills that are essential in offices. Since we know so little about what is considered *essential* skill, perhaps the only safe approach for the teacher would be to set up standards both as to quality and quantity that would be high enough to meet the requirements of those offices that do have high standards.

It is one thing to set up objectives and another to get the students to accept them as their objectives. We are well aware that intrinsic motivation is far more effective than extrinsic. More frequently than not, grades are used as a motivating device. The grades reflect our genuine, as opposed to stated, objectives. We use grades as rewards, as punishment, as lures.

There will be no attempt here to justify or condemn the emphasis on grades as a motivating device. It must be recognized, however, that students tend to accept as important only those elements they know will be made a part of the grade they receive.

Too frequently, the student does not realize where he most needs improvement. Errors are marked with our favorite weapon—the red pencil—and sometimes comments or suggestions are written in the margins. Too frequently, also, the student glances to see if he had a "lucky" day, shows his papers to his neighbor if he passed, tosses it in the wastebasket if it is marked.

It would seem important, then, that the students know in advance how they will be graded, have an awareness of the progress that is being made, and know where the weaknesses are that need additional effort.

In an effort to make the student more conscious of his own errors, to improve his proofreading ability, and to give the instructor an indication of remedial needs of the class, Form A, which is shown here, was devised for use in the transcription class. It will be noted that using this form will not be as time consuming for the teacher as requiring correction and retypewriting of letters.

FORM A. ERRORS MADE ON TRANSCRIPTS

Name ____________________ Week ending ______________

Punctuation: ________________________________

________________________________________

Spelling: ________________________________

________________________________________

Word Choice: ________________________________

________________________________________

Apostrophe: ________________________________

________________________________________

Hyphen: ________________________________

________________________________________

This form is duplicated on a full sheet of paper and more space is left for each classification of error than is shown in the illustration. Students receive one form each Monday and return it at the end of the week with the letters that have been marked as unmailable, as well as those that are to be recorded.

When the transcripts are checked, an error is not indicated by other than a check mark at the end of the line in which it occurs. It is the responsibility of the student to locate the error, correct it with pen, and record it on Form A. Help is given to those who cannot locate the errors; but, if the student cannot locate an error, he is required to do some remedial work. As an illustration, a student who could not locate a comma error after an introductory clause might be required to write at least five sentences in which an introductory clause is used. Later in the year, total errors are shown at the top of the letter but are not checked at the end of the lines in which they occur.

Another form that may be used (Form B) is handed to the students at the beginning of the course. The objective of the course and the form are explained. The class is told that this form is a duplicate of the individual record that will be used by the teacher as a partial basis for grading. Usually, the student keeps a record of his own achievement and is very much aware of areas he may need to emphasize. The student is highly motivated and is willing to put forth the necessary effort to qualify for points.

Some teachers have questioned the use of the complete theory tests in a class of this kind. Such studies, however, as those by Jester, Danielson, Hillestad, Fermenick, Peters, Klaseus, and Ellingson, point out the value of accuracy in shorthand notes in relationship to accuracy of transcription and quantity of material transcribed. It was assumed, therefore, that a good review of theory might help some students to write more legible notes and thereby qualify for more points both in accuracy and speed of transcription.

Certainly either of the suggested forms would need to be adapted to a particular situation and to include the objectives of a particular class. They are offered here as a suggested technique and not as a panacea for all transcription difficulties.

### FORM B—Individual Record and Achievement Goals

### Achievement Goals—Dictation Speed

| | | |
|---|---|---|
| _____ 1. | 60-word take with 95% accuracy | Bonus points |
| _____ 2. | 60-word take with 98% accuracy | (One each rate) |
| _____ 3. | 80-word take with 95% accuracy | |
| _____ 4. | 80-word take with 98% accuracy | |
| _____ 5. | 100-word take with 95% accuracy | |
| _____ 6. | 100-word take with 98% accuracy | |
| _____ 7. | 120-word take wtih 95% accuracy | |
| _____ 8. | 120-word take with 98% accuracy | |
| _____ 9. | 140-word take with 95% accuracy | |
| _____10. | 140-word take with 98% accuracy | |

### Accuracy Transcription

| | | | |
|---|---|---|---|
| _____ 1. | 3 mailable transcripts at 60 | Bonus points | |
| _____ 2. | | (All mailable letters) | |
| _____ 3. | | | |
| _____ 4. | 2 mailable transcriptions at 80 | _______ | _______ |
| _____ 5. | | _______ | _______ |
| _____ 6. | 2 mailable transcripts at 100 | _______ | _______ |
| _____ 7. | | _______ | _______ |
| _____ 8. | 2 mailable transcripts at 120 | _______ | _______ |
| _____ 9. | | _______ | _______ |
| _____10. | 1 mailable transcript at 140 | _______ | _______ |

### SPEED TRANSCRIPTION (wam)

Bonus points
(All mailable letters
transcribed at rate
indicated)

_____ 1. 60-word speed take transcribed at 15
_____ 2. 60-word accuracy take transcribed at 15
_____ 3. 60-word speed take transcribed at 20
_____ 4. 60-word accuracy take transcribed at 20
_____ 5. 80-word speed take transcribed at 15 _______ _______
_____ 6. 80-word speed take transcribed at 20 _______ _______
_____ 7. 80-word accuracy take transcribed at 15 _______ _______
_____ 8. 80-word accuracy take transcribed at 20 _______ _______
_____ 9. 100-word speed take transcribed at 15 _______ _______
_____10. 100-word speed take transcribed at 20 _______ _______
_____11. 100-word accuracy take transcribed at 15 _______ _______
_____12. 100-word accuracy take transcribed at 20 _______ _______
_____13. 120-word speed take transcribed at 15 _______ _______
_____14. 120-word speed take transcribed at 20 _______ _______
_____15. 120-word accuracy take transcribed at 15 _______ _______
_____16. 120-word accuracy take transcribed at 20 _______ _______

### RELATED SKILLS—COMPLETE THEORY

_____ 1. 3 complete theory tests with a grade of 85 or above
_____ 2.
_____ 3.
_____ 4. 2 complete theory tests with a grade of 82 or better
_____ 5.
_____ 6. 1 complete theory test with a grade of 97 or better
_____ 7. 1 complete theory test with a grade of 100

### SPELLING

_____ 1. Spell in syllables a list of 50 selected words, 85
_____ 2. Spell in syllables a list of 50 selected words, 92
_____ 3. Spell in syllables a list of 50 selected words, 97
_____ 4. Spell in syllables a list of 50 selected words, 100

### PUNCTUATION

_____ 1. Grade of 85 on punctuation test
_____ 2. Grade of 92 on punctuation test
_____ 3. Grade of 97 on punctuation test
_____ 4. Grade of 100 on punctuation test

A qualifying score on any of the factors listed will automatically give credit for preceding scores in that area. For example, a dictation speed on 80-word take transcribed with no more than 10 errors could qualify for 4 points if the preceding steps had not already been completed. Final grade is based on the proportionate number of points earned.

## BOOKKEEPING AND ACCOUNTING

# 18. Center Bookkeeping Around the Individual

**KELVIN G. MILLER,** Internal Revenue Service, Charlottesville, Virginia
**PAUL R. LONG,** Elkton High School, Elkton, Virginia
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Individual ability and speed of production varies widely in most bookkeeping classes. Planning of class work to provide for the slow, medium, and fast workers is a major task confronting the teacher. There may be only a small range of variation in ability to comprehend, but various factors govern the level of achievement to be expected of the individual student. In addition to native intelligence, some of the factors that influence student achievement are interest, study habits, emotional stability, parental control, and various environmental influences outside the school.

To have all students work on the same assignments at the same time creates an undesirable situation. When the same assignment is given to everyone at the same time, the fast learners complete the assignment and, in all probability, become bored while waiting for the slow worker. If teachers attempt to gear the rate of progress to the fast learner, the slow learner becomes hopelessly frustrated. A system in which all students have equal opportunity to reach a level of achievement more nearly reaching their potential is followed by the contributors.

This method should eliminate the problem of unnecessary failures without restricting the progress of the more interested and capable student. The solution is simple in theory but is seldom used because many teachers fear they would not be able to control the class and maintain an orderly program of instruction.

### Introducing and Organizing the Course

The first two or three weeks of the course should follow conventional methods in use at the present time. First, there should be an over-all discussion of the course. Basic principles such as classification of accounts; the double-entry bookkeeping system; and the meaning and relationship of the asset, liability, and proprietorship accounts should be introduced and drilled intensively. This is accomplished by teaching the class as one group. Everyone works at the same drills at the same time. The chalkboard, charts, diagrams, and T accounts are used for the extensive drills.

The students make their own T accounts at their desks and when transactions are given by the teacher, the students record the changes that take place in the various asset, liability, and proprietorship accounts in their own individual T accounts.

This first period of instructional drills should give the student an understanding of the basic functions of the bookkeeping process. Without the mastery of this, the bookkeeping student will not grasp the meaning and significance of future transactions. It is extremely important that the students have a thorough understanding of the basic fundamentals before proceeding to other topics.

### Beginning Problem and Textbook Work

Following the introduction to the course and the drill work, all students are ready to begin the textbook reading and workbook problems for the first unit of work. The first unit normally consists of the first three chapters —all students start at the same time. The entire textbook should be divided into units of work with each unit listed on a progress sheet.

Introduction, lecture, and discussion of chapters 1, 2, and 3 are given to the entire class at the same time. This is the one and only unit that is handled in this manner. Succeeding units are explained on an individual and small group basis as the students complete each unit of work and are allowed to proceed to the next unit.

Before the student is permitted to proceed to the next unit he must: (a) read the chapters of the textbook included in the unit; (b) complete correctly and neatly all problems at the end of each chapter; (c) answer correctly a short test of objective questions to a degree which indicates a thorough understanding of the principles of the unit; and (d) complete at least one problem completely and in correct form to demonstrate the ability to apply the principles given in the unit.

When a student fails to indicate that he is ready to proceed to the next unit, additional review and problem work is assigned from the supplementary problems found in the back of the textbook. If extra copies of necessary bookkeeping forms are not available, students may prepare forms for the additional problems. Another test covering the unit, but composed of different questions and problems, is taken by the student when the supplementary problems have been completed. This procedure is repeated with each student as he completes the first unit and each of the units that follow.

This plan may be extended into the second-year course; therefore, students who complete the first-year course before the end of the year could continue into the second year textbook.

### Lesson Plans and Assignments

Since this program is based primarily upon the individual's progress, formal lesson plans are not needed after the units of work, projects, and practice set requirements have been determined.

The teacher must set up a plan whereby a check of each student can be made frequently. Individual help and attention must be provided for each student. In addition to answering questions on problems the student might have relating to his work, the teacher must encourage him to maintain an interest in the course. Individual motivation then becomes the key factor for the teacher. In addition to short discussions with the entire class and individual conferences, the teacher can utilize a progress chart. In using a progress chart, numbers should be substituted for names to prevent possible embarrassment to the student. A separate chart should be placed on the bulletin board for each class. These charts enable the students to campare their progress with others in the class.

Workbook exercises are collected or checked only when all problems in a unit have been completed. The problems must be worked in ink, except problems that in actual practice would be done in pencil. Students are permitted to work in pairs when they find it necessary or desirable. However, the teacher determines if it is more beneficial for the students who desire to work together to do so. During the daily check of each student, progress can be watched closely, and if the progress indicates that work outside the classroom is necessary, specific homework can be required.

At the beginning of the class period, the teacher should formulate some form of discussion which enables him to establish order and create a business-like atmosphere in the classroom. After all students have their materials and are working on their projects, the teacher can begin with the individual assistance and progress checks.

### Testing and Grading

The problem that now becomes evident is testing. The primary problem is that of preparing tests for individuals working at different levels of progress without the tests becoming invalid due to circulation. Two types of tests should usually be given on each unit before the students are allowed to proceed to the next unit. The first type of test is the objective or short-answer test. The second type is the problem test.

The following is a suggested plan for using the objective tests:

1. Prepare 75 to 100 objective questions for each unit.
2. Typewrite each question on a 3" x 5" card.
3. Designate one day each week as "test day."
4. Select a combination of question cards from the unit the students are being tested upon.
5. For successive tests on the same unit, select a different combination of questions from the test-question cards.

For the problem-type test the students should complete at least one problem similar to the problems included in the unit just completed. The problems should be constructed so that whole numbers are used. The same problem may be used several times by a simple change in a few key numbers. In grading the problem tests, emphasis should be placed on application of correct principles and practices instead of correctness of arithmetic.

Achievement records and report card marking may be simplified by utilizing a progress form. The duplicate form placed on the bulletin board, in addition to being an excellent motivational device, will keep the students informed as to approximately where they stand. A letter grade should be recorded for tests and for problem work after the completion of each unit in the teacher's own grade book. A check mark indicating completion of the unit should be made on the chart on the bulletin board. The problem work should be graded primarily for neatness and accuracy. The problem work grades, however, should have much less weight in report card marking than the test scores.

Standards of progress must be set up to determine what must be done for a specific grade at a particular quarter, semester, or final marking period. Meeting the minimum progress requirement does not necessarily guarantee the specified grade to the student. Class attitude, participation, effort, penmanship, and other factors should be taken into consideration when evaluating the student.

Providing for individual differences is one of the most important responsibilities of a teacher in any classroom. We believe that the bookkeeping program outlined in this article will go further toward meeting the individual differences, not only of the slow learners, but it will also provide an opportunity for the above-average student to excel to a degree not possible in a class conducted in the traditional manner.

The correct application of this program should result in the following advantages:

1. Does not hold back the talented student.
2. Permits the slower student to learn well that part of the material he can cover.
3. Prevents a student who has been absent from falling behind and becoming hopelessly lost.
4. Will not hold back the sporadic worker when in a period of enthusiasm, nor will he become lost when in an occasional period of less interest.
5. Allows a student transferring into the class to begin at the point that fits his level of achievement.

## 19. Review in Bookkeeping Instructions

**GERALD W. MAXWELL,** San Jose State College, San Jose, California

Review involves bringing again to the students' attention a topic which was originally presented earlier in the course. Review may relate to the lesson of the previous day, week, or month. Review may concern a portion of one chapter, several chapters, or all the chapters covered thus far. Review is used to remind students of forgotten material, to reinforce original learning, and to clear up misconceptions carried over from original learning. At the beginning of the class period, review can direct students' attention toward bookkeeping and away from other subjects. Review is, of course, very helpful before all bookkeeping examinations.

Bookkeeping students often exclaim, "I can follow the presentation all right in the classroom; but when I get home and try to do the problems alone, I run into difficulty." Remarks like this demonstrate that review is essential to successful learning in bookkeeping. Because of the inherent complexity of bookkeeping principles, students should be exposed to principles and applications of principles several times. This is true even when the original teaching and learning is of high quality. Bernard[1] stated well the need for review:

"Time spent on overlearning is profitable in terms of the wider ramifications of learning. Review, drill, discussion of pertinent problems, and the presentation of examples . . . will increase the degree of learning that fosters transfer. One need not reflect very deeply on his own educational experiences to realize that the anxiety of teachers to cover the subject often resulted in superficial and incomplete learning. Teachers at all levels, from the primary grades to college, become concerned about completing the lesson. They shorten the learning process by resorting to lectures that leave the students bewildered. More time spent in elaborating on the materials that are covered will lead to better understanding and to overlearning and will increase the amount retained after a lapse of time. Better retention itself will lead to more transfer because the materials will be remembered for more new situations."

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[1] Bernard, Harold W. *Psychology of Learning and Teaching.* New York: McGraw-Hill Book Company, Inc., 1954. p. 178.

Four specific techniques which may be used when reviewing bookkeeping instruction involve (a) oral review questions—oral answers, (b) oral review questions—written answers, (c) written review problems with key, and (d) individual review assignments. These four techniques work especially well in teaching bookkeeping inasmuch as problem solving is so inherent in bookkeeping. Some detailed suggestions for utilization of these techniques are given below:

1. *Oral Review Questions—Oral Answers.* Let us assume that yesterday's presentation covered the differences in adjusting rent when the original outlay involves an asset compared to when the original outlay involves an expense. At the beginning of class today, you might ask these questions and call for oral answers from the group. (Note that each of the questions calls for very brief answers.)

Q. *Prepaid rent entered originally as an asset. When you adjust, what do you debit?*
  A. Rent expense
Q. *What do you credit?*
  A. Prepaid rent
Q. *Prepaid rent entered originally as an expense. When you adjust, what do you debit?*
  A. Prepaid rent
Q. *What do you credit?*
  A. Rent expense.

Noting the reaction of the class to your questions gives a clue to the extent of their learning thus far. If they give a wrong answer, it is an obvious cue for further explanation. Perplexed expressions on the faces of a few students (even when the majority of the class give correct answers) are also a guide to the need for further clarification. When asking these questions, incidentally, it might be well sometimes to call on individual students as a test of their grasp of yesterday's presentation.

This particular technique, used at the beginning of the class period, has an additional advantage. Remember, your students have just come either to school or from another class. If Johnny has just come in from chemistry lab, for example, these oral review questions will help divert his attention from the sulphuric acid of the chemistry lab to the business at hand in your bookkeeping class.

2. *Oral Review Questions—Written Answers.* With this procedure, you ask the review questions orally and the students write their answers. Note in the following examples that the questions are worded so that brief answers are suitable.

Q. *What classification is accounts payable?*
  A. Liability
Q. *When you pay on an account you owe, does this decrease or increase the balance of the account?*
  A. Decrease
Q. *How do you show a decrease to a liability?*
  A. Debit.

The papers may be retained by the students or collected by the teacher. In either case, however, it is essential that the class immediately "go over" the answers and discuss them.

The questions above, it may be noted, concern three concepts that every bookkeeping student should know thoroughly: classifying accounts (cash is an asset, accounts payable is a liability, and so on), knowing whether an account is decreased or increased as the result of a given transaction, and knowing whether the increase or decrease is indicated by a debit or by a credit. These three concepts cannot be learned too thoroughly; they should be viewed and reviewed just as often as possible.

3. *Written Review Problems with Key.* This technique works very well to help prepare students for an examination. You give a review problem or problems for the students to work in class. With the problem, you also give the key.

Here is how this technique might be applied: Suppose your examination is to cover the material in chapters 9, 10, and 11; you believe your students are rather hazy about the content of chapter 9. On review day, you assign a problem which relates to chapter 9. The problem may be from the textbook or it may be one which you develop. The solution may be duplicated and copies passed out to the students, you may work the problem on the board while the students are working it at their desk, or you may do both. In any event, the solution should include the key steps as well as the ultimate answer.

The students are directed to use the key when they run into difficulty but only after they themselves have genuinely tried to overcome the difficulty. After all, you explain, they will not have the key when they take the examination. On the other hand, urge them to use the key when necessary. This insures correct learning.

After most of the students finish the problem, it is important to discuss the major points. If the solution has been put on the board, discussion of the problem is simplified because you may easily indicate specific points. During the discussion, emphasize the items which are important. Encourage questions.

4. *Individual Review Assignments.* For each chapter it is well to select one or two supplementary problems which feature special points you wish to highlight. Indicate that students may, on an optional basis, do these supplementary problems and that you will go over their solutions on an individual conference basis. The supplementary problems will probably be worked by top students who are not totally challenged by the regular class assignments or by students who are having difficulty and wish to work the extra problems as additional preparation for examinations. The best policy is to have your class understand that the optional problems are for the purpose of obtaining a deeper grasp of essential principles, and the students should not expect to have their grades affected directly by this additional work.

## 20. Make Systems a Part of Bookkeeping

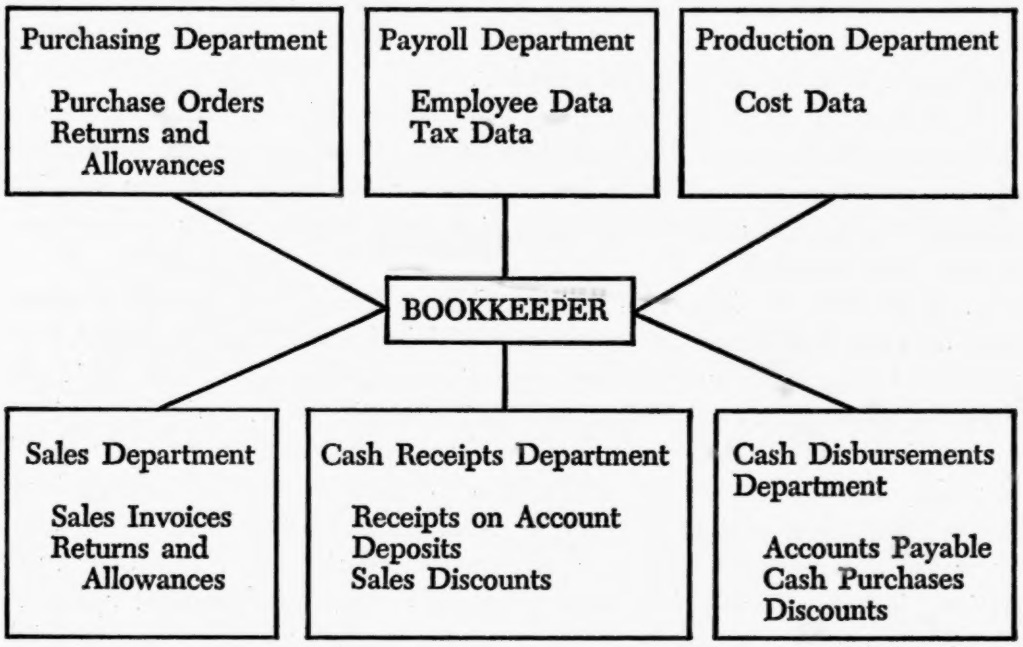
**ROBERT D. MacDONALD,** Maine Township High School East,
Park Ridge, Illinois

Any attempt to separate bookkeeping from office systems results in a sterile subject that isolates it from the context in which it functions. Such an artificial treatment limits the breadth and effectiveness of understanding bookkeeping subject matter.

Very few bookkeepers spend all their time in activities normally thought of as bookkeeping. Relatively little time is spent in journalizing, posting, or preparing statements. Much time is spent in clerical activities

—receiving, checking, processing, and filing documents that originate at some other point in the business.

The illustration below shows how documents and information flow from various sources to the bookkeeper.


Purchasing Department
Purchase Orders
Returns and Allowances
Payroll Department
Employee Data
Tax Data
Production Department
Cost Data
BOOKKEEPER
Sales Department
Sales Invoices
Returns and Allowances
Cash Receipts Department
Receipts on Account
Deposits
Sales Discounts
Cash Disbursements Department
Accounts Payable
Cash Purchases
Discounts

Flow Chart of Information to Bookkeeper

While the bookkeeper need not know how to perform each operation involved in the processing of these documents, he needs a general understanding of what each department does with the documents. The greater the understanding, the greater the value of the bookkeeper to his employer, and the better prepared the employee is for advancement.

In even the best of systems, there are breakdowns in routines. The competent bookkeeper, therefore, cannot accept the documents he receives on faith alone. He must be sufficiently aware of company policies and systems so that he is able to detect the more obvious deviations. In order to ask intelligent and pertinent questions of those who processed the paper, the bookkeeper must be able to retrace the steps the document traveled before reaching him.

This does not imply that bookkeepers are responsible for all the work done by all the personnel of a business. It does mean that the bookkeeper, who is the last person to process the documents, is the last one to be able to verify their accuracy and should do so if possible.

Some students will be employed in routine bookkeeping jobs in which they do nothing more than transfer data from one place to another with no responsibility or authority to question the accuracy of those data. Such jobs, however, are generally being eliminated by electronic data machines so that these are positions for which the secondary schools should no longer be preparing their students.

A good bookkeeping course must take other than recording activities into account. It cannot concentrate solely on journalizing, posting, and preparing statements. It cannot be an encyclopedic presentation of a variety of topics such as worksheets, payroll, adjusting and closing entries.

It is a rare bookkeeper who prepares end-of-period entries or statements on his own initiative. These are usually done by an accountant either from within the company or by one hired when needed.

Business education teachers should be constantly aware of their students' lack of understanding of office systems. Most young people are totally unaware, for example, that a document, such as a purchase order, initiates a series of activities that move in a prescribed fashion with several people performing a variety of steps until the sequence is completed. This fact, so clear to anyone with business experience, is completely new to many students.

To include such training in office systems in a bookkeeping class would not be difficult. It is simply a matter of bookkeeping principles and office systems taught as a single unit rather than as separate units or topics.

Most textbooks include topics on bookkeeping procedures for recording such transactions as sales, purchases, cash receipts, cash payments, payroll, and so forth. Each of these topics can be easily expanded by the teacher to include a discussion of the procedures by which these transactions are processed by a business.

The topic dealing with recording sales, for example, can be expanded to include an organization chart of a typical sales department and used as a basis of discussion of the various functions of the department. A flow chart can be used to show the movement of documents from one operation to another. Both the organization chart and flow chart can answer such questions as the following: What happens to an order received from a customer? Who deducts the items sold from the inventory record? How does the shipping room know where to send the goods? At what point is an invoice prepared? A simple diagram can be used to illustrate the flow of sales department operations.

Numerous other areas of office activities can be approached in this manner. The processing of purchase orders leads to a greater understanding of accounts payable. The treatment of cash can include methods of cash control. Payroll procedures can trace an employee from the time of employment, to time cards, to payroll records, and to tax returns. A discussion of inventory control can provide a brief introduction to costs.

Ideas for flow charts and procedures can be found in many college textbooks on business organization. However, since these texts treat the subject much more deeply than is necessary for a high school class, the teacher will need to simplify the charts and descriptive materials.

The adoption of these suggestions will add meaningful material to the existing bookkeeping course. It will broaden the students' awareness of the business world in which they live. Business systems must become a part of the bookkeeping course.

# 3

# Suggested Standards and Evaluation

## 1. Flexibility in Standards

**HELEN LUNDSTROM,** Utah State University, Logan

It was "one of those days." The undercurrent of confusion as the students started their projects for the day echoed the teacher's bewilderment that such a simple, routine problem should cause such a stir. Precious minutes were wasted while members of the class asked each other: "Do we make a carbon copy today? Can we erase? How many times do we type it? What space line do we use? How far down did he say we should start?"

In a situation where standards are usually clear cut and evaluation of work is sometimes uncompromising, our students expect (and deserve) careful detailed instructions regarding these standards against which their work will be measured. They learn to follow our instructions faithfully and somewhat blindly, knowing, in a way that students know, that the conditions of the rules we have laid down must be satisfied exactly. In order for them to develop respect for the work they must do, surely part of our instructions should clearly define: "How important is this job? Why am I doing it? For what purpose is the material to be used?"

There is no question but that high standards must be carefully taught, not left to chance, as we prepare workers for this electronic age. We should expect our students, as a result of their training, to be able to initiate correct procedures in offices where they are employed. But do we not also have a responsibility to teach these students the flexibility that business demands?

Just as we recognize the truth of the admonition, "A time to be born, and a time to die," so must all those concerned with establishing office standards realize that there is a time for perfection in standards and a time when less than our best efforts are acceptable. Certainly we would not require a preliminary draft of a manuscript to be typewritten with the same care that we would require of the finished form. Neither would we accept the copy that is to be submitted for evaluation in anything less than perfect form and presentation.

This, of course, most supervisors and administrators recognize without question. Every day in our own office work, we make compromises with the standards we usually teach in our classes as irrevocable. And our students, seeing these compromises and recognizing them as less than the standards we require of them, may decide we are of the "do as I say and not as I do" school of inconsistency.

Are we then contributing to a feeling that actual business standards are less than classroom standards by not *teaching* some of these compromises? Or at least by not teaching an understanding of the variability of standards? Consider for a moment the matter of acceptability of carbon copies. We recognize that each student must learn to make acceptable corrections on carbon copies so that he is able to meet the challenge of multiple copies, each submitted in mailable form. Should we not also require exercises in making carbon copies where we teach the students not to waste time correcting errors on the file copy? If a strikeover does not make the copy illegible, why should we insist that the student spend time every time to correct each error on the carbon copy? So long as the copy is readable, should we not teach this timesaving compromise where the situation deems it acceptable?

Differences in standards of mailability must be readily recognized though they are not usually admitted. One prominent author confessed to three standards of mailability determined by the time of day: at 10 a.m. he said, "Do it over." At 2:30 p.m. he asked, "How much other work do you have to do?" At 4:30 p.m. he often made the correction in ink, without comment, and mailed the letter. Another factor that may affect mailability is the importance of the recipient of the letter. One usually efficient secretary was chagrined when her employer returned a letter to be retyped because she had made an erasure. Even though the erasure was neatly done, he considered the letter unmailable because of the importance of the message and the importance of making a good impression.

Most teachers are occasionally confronted with a question from a student who may be working part time, or who has worked full time, in an office where standards do not measure up to those required in the classroom. "In the office where I work, they don't make us do that," the student may complain. Or, "We always do it this way," she may plead. It is difficult indeed to insist that the successful employer may be wrong. Again we must emphasize the necessity for adaptability—raising the standards in her office where she can, and conforming to those that she cannot change. There is probably no *one* universally accepted standard that stereotypes all offices.

One young secretary had been taught by an unbending teacher that "percent" must *always* be written as two words. On her first job, she was required to type all correspondence from her employer's longhand notes, and every time "per cent" was used he had written it as one word, "percent." Each time she typed it she dutifully made the correction, and each time he proofed her letters before signing them he closed the gap between the two words with inked brackets. Not until her employer finally proved his point in a dictionary did our young friend learn this important lesson—that though one form may be preferred, there are other forms that are acceptable.

In many areas there are no demarcations of *right* and *wrong* in setting standards. Most standards are flexible from time to time in one situation as well as from situation to situation under different circumstances. Let us not, however, overlook those areas in which "right" and "wrong" can and must be established. There are few acceptable variations in spelling for example. Although some hard and fast rules may be laid down for punctuation, there is considerably more flexibility here than in the area of capitalization, to name one area.

Granted, our students must be taught to listen and to follow instructions. They must be taught to make their work as attractive and as neat as possible. They must learn that nothing less than their best efforts deserves to represent the company for whom they are working. But let us teach high standards with a purpose.

Experience and maturity will help each office worker decide the importance of the work she is doing. The office worker will learn to rely on her own judgment in making decisions where complete instructions have been omitted. And she will not be penalized for adaptations, since the office standards are not usually so definite that there is only *one* acceptable form. Although we teach that double spacing is preferred in a three-line envelope address, must we not recognize that an envelope with a single-spaced three-line address will be delivered just as promptly as though the address were double spaced? Must we insist that our worker throw away sheet after sheet of paper because enough space was not left between the date and the inside address, or because she failed to change the length of line?

We know, through first-hand experience, that practical adjustments can save time and money in an office. There are times when perfection must take a back seat to practicality and economy. Let us help our students recognize this sliding scale of standards by making our assignments varied enough that they will teach at least some degree of flexibility.

## 2. Standards for Job Proofing

**MARION WOOD,** International Business Machine Corporation,
New York, New York

We have become a computer-dependent society in the information and paper processing area. Our very lives are influenced and dependent upon these fantastic electronic devices, for each person is either a name or statistic on some memory core of some computer. Computers are here to stay, to increase, and to multiply.

The first computer delivered in 1949 has been retired to the Smithsonian Institution and in the past 15 years the growth of the computer has been phenomenal. According to Mr. Phillips, director of Data Processing Division of BEMA, we are witnessing the third generation of computers. This new generation will include storage capacities in the billions of bits, it will see computers built in smaller sizes, and it will be even possible to plug tomorrow's computers into an ordinary wall socket.

Recently IBM announced a unit that provides information in the spoken word. This computer can make millions of business facts available over the telephone, and it can be linked to five different types of computers. A vocabulary of words and sounds is recorded by the human voice and stored on a magnetic drum within the computer. With a suitable arrangement provided by a common carrier, any telephone can be used to make contact with the computer 7770.

Just what does this spectacular growth of the computer do to the job market and what should be our standard for job proofing students today?

Picking up a current advertising section of the *New York Times* I turned to the classified section, and browsing through the pages I found jobs listed as follows:

Airline agent or clerk
Biller
Bookkeeping assistant
Bookkeeping machine operator
Comptometer Operator
Cost clerk
Credit clerk
Bi-lingual secretary
Secretary good at figures
Calculating machine operator
Cashier
Claims clerk
Personnel clerk
Phone order clerk
Rate clerk
Receptionist (with or without skills)
Secretary who can think and act quickly
File clerk
IBM proof operator
Insurance clerk
Inventory clerk
Key punch operator
Library assistant
Mail clerk
Messenger
Multilith operator
Office assistant
Office boy
Registration clerk
Shipping clerk
Statistical clerk
Statistical typist
Stock buyer clerk
Supply clerk
Switchboard operator
Technical typist
Secretary with administrative ability
Duplicating machine operator
Figure clerk
Teletype operator
Teller
Typists (men and women)
Transcriber
Wrapper

As you check through this list, several things will catch your eye. The demand for shorthand writers and secretaries is still high; the number of bookkeeping machine operators wanted is high; typists can be either men or women; receptionists are in great demand; in fact, one ad asked for a receptionist with "no skill" required. The "no skill," I expect, was referring to the ability to write shorthand and transcribe it. Ads gave emphasis to such personal qualifications as:

Job pays $25 for your skill and $100 for your tact and diplomacy.
We need a secretary who can think and act quickly.
If you're a Phi Beta or almost as smart, and can type well and have administrative ability, we have an opening for you.
A meticulous typist, light stenography, handles details responsibly, must be intelligent, refined, sincere and over 20.
An excellent stenographer, accurate, rapid, neat, good at figures, good memory, a serious person, and willing to assume responsibility.
The Gal Friday must be bright, and good at figures—an excellent typist.

Many ads showed openings for a fast, electric typewriter operator. Others emphasized transcription from recorded dictation. Quite a number asked for experience for typing paper plates for offset. One ad for a typist required experience with a good knowledge of justification.

The requirements of the basic skills of reading, figuring, speaking, spelling, and handwriting were all evident in the type of jobs advertised.

Some of the jobs demanded a knowledge of business and a sense of business ethics. Others required technical skill. The knowledge of complex machine operations, company policies, and specialized procedures in most cases would be picked up on the job. Efficient work habits, the ability to handle figures, and a knowledge of bookkeeping and typewriting enhanced advancement. Mathematical and mechanical ability was also extremely helpful. Checking opportunities for employment indicates that shorthand classes are not affected except that the computer creates a demand for more and better trained secretaries. Somehow we need to expand and accelerate these courses, and still keep our standards high.

The "why" and the "what" of bookkeeping is needed by the machine accountant, the general businessman, the small business people, club members, and even the housewife. Chester Hines, supervisor of machine accounting for Sheffield Steel Company, once remarked: "Students need an understanding of the term balance sheet as much as they need mathematics and Chaucer." The computer can turn out a balance sheet, but it cannot compose one. Debits and credits are still debits and credits whether you write them with a pen or punch them in on a magnetic tape. The accounting teacher must include in her standards economic literacy as well as job competency.

Typewriting is securely anchored in our electronic data processing systems. Many of the vast quantities of input data that our computers demand are prepared by electro-mechanical devices that have much in common with the keyboard of an electric typewriter. And besides, the typewritten message is still the most important means of communication in business. In order to meet the demands of our electronic age, our standards in typewriting must emphasize speed with accuracy and the ability to think creatively. Courses should also include information on type styles, paper, carbon papers, and ribbons that are best suited for the message being recorded.

Communication problems loom larger as business becomes more complex in structure. In order for a secretary to be adequately job proofed for production in tomorrow's office, she must be able to use English that is persuasive in both the oral and written communications. She needs to know how to extract material; how to take notes for her employer; and she needs skill in fast reading comprehension.

Statistics show that it costs $75 to maintain a file drawer annually. This includes the space, labor, and overhead. The Hoover Commission estimated that the United States business now files, stores, and maintains over one trillion pieces of paper with a maintenance cost of one cent a sheet per year. These figures do not in any way minimize the importance of filing and the work of the so-called file clerk. It is true that methods of condensing records may relieve some of the hours devoted to this gigantic paper storing effort. New space saving systems are costly, and, therefore, it becomes extremely essential that materials for storing be carefully selected. In teaching filing, our standards should emphasize coding and classifying, as well as a basic knowledge of filing rules. Data processing will not change basic classifications. The National Association of Educational Secretaries proved this in their revision of "File It Right and Find It." This group was motivated to do the revision because so many school offices were using data processing. Careful study of the subject classification listed in their 1953 manual showed that the same subjects and classifications could be used with data processing. After all, data processing was only a more rapid and accurate system of handling the records. The subject classifications used in 1953 could still be used in 1964. Some had to be up-dated for now we talk about "team teaching" and the terms associated with it. These terms were not used in 1953. Another area involving new terms was in-service training.

Voice recording machines have far greater usage today than in the fifties, because they save composing time and transcription time. Even technical men who have been reluctant to put their rough drafts in other than handwritten form find they can have a rough draft typed, revise it for final typing, and still save time. So in job proofing students for tomorrow's production we must make certain that our standards indicate that they are equally skilled in handling transcription for either machine or shorthand dictation.

Most of the changes in our course standards for job proofing will probably find their location in the so-called office practice course. It is in these courses we have a flexibility that permits integration of learning. It is here we combine the basic skills with the teaching of computer concepts and the skills of the peripheral equipment. Before students can handle even the peripheral equipment in electronic data processing, they should have at least one year of typewriting, and they should be able to type from 40 to 50 words a minute accurately. In fact, the faster they type, usually the better card punch operators they become.

High school students quickly comprehend computer concepts when we draw a parallel between recordkeeping and the punched card. At least 20 different types of operations may be involved in handling a record. A record may be read, checked, corrected, changed, coded, duplicated, filed, arranged, sorted, posted, copied, typed on other forms, searched, compared, stamped, counted, computed, listed, summarized, or used in the preparation of other documents. None of these operations can be mechanized unless the information is recorded on either a punched card or a magnetic tape. So in our first lessons of computer concepts we build around the function and design of the punched card, and gradually advance to the unit where finger facility in manual punching is practiced. Time and need of the students will indicate the standard we set for a course in basic computer concepts. One standard would be a basic understanding of the computer concept. Another standard might be a basic understanding of the computer concept and an acquaintance with the peripheral equipment such as the punched card machine. And a third standard would be the skill and competency in actually operating the peripheral equipment.

During my study of the classified section of the *New York Times* I found 60 ads one week for punched card operators. Even though we read of the progress being made toward direct communication between the manufacturing process and recording, and though there are some installations of optical character recognition equipment, there is still a demand for card punch operators. The turnover is high, and this tends to create a short supply of experienced card punch operators.

Whereas, tomorrow's office worker must be highly skilled in handling machines and especially accurate in their operation, teachers should keep in mind that many of the skills will be used only for initial employment. If our students wish to advance on the job, they must keep constantly informed and education must be a continuing process. EDT systems, electronic data processing systems, require a worker with a knowledge of business functions and operations, a knowledge of business management that permits him to build work habits for efficient work flow. The same characteristics needed for success in the office of '46 are still needed in the office of '66: quality, quantity, adaptability, and knowledge. Today's office worker must be extremely flexible; he must be able to move from job to job quickly and easily. The duties in the modern automated office are far more complex than they were in '46.

High standards in our business education classes can only be attained when the instruction becomes individualized and learning time is conserved. Therefore, teachers need to appraise the advantages of the modern teaching tools, tapes, records, dictating units, electronic classrooms, television teaching, team teaching, programmed learning, and visual aids. Traditional techniques may need to be replaced by new and better methods of instruction. The decisions required of the business teacher in establishing standards to meet rapid technological changes are many, and they are complicated. A business teacher must be a master craftsman, well versed in time and motion study. A business teacher must be an expert in planning, scheduling, guiding, and directing. The standards established must not only be for the initial job employment, but for a lifetime career. Standards should emphasize the basics. We must devise new and better methods to attain these standards, and above all, standards need to be continually revised and reviewed in order to keep step with the rapid technological changes in today's office.

## 3. Practical Standards for Machine Transcribers

**ALBERTA FRERICHS,** University of Washington, Seattle

Many a secretary has found the transcribing machine helpful in getting more work done and in less time. Along with being a time-saver, this machine has allowed the secretary and her employer greater flexibility in their work schedules. With the many mechanical improvements of the transcribing machine has come increased usage. The classroom teacher is concerned with keeping up to date with what is expected of the office transcribing machine operator and how to relate these office requirements to classroom standards.

As business educators know, there are many factors that contribute to the difficulties of setting standards. Among these are the lack of uniformity of conditions under which the machine is used—a stenographic pool with or without the telephone system, a private secretary's office or a stenographer's desk, the amount the machine is used, and the mechanical characteristics of the machine.

Despite these difficulties of measurement, the transcription of six to eight average-length letters hourly seems to be the usual on-the-job output of the transcribing machine operator. Thus production is probably at a rate of between 20-35 words a minute, considering that transcribing a letter includes making at least one carbon copy, addressing an envelope, and attending to such details as assembling enclosures.

## Daily Output

Undoubtedly, daily output is a more accurate measurement than the hourly transcription rate since business must measure its production costs and determine the number of workers needed on a daily output basis. The lead stenographer in one pool reported that in a day's time most of the operators transcribe around 30 average-length letters dictated by persons from various departments. One operator who includes many of the routine letters of the credit department in her transcription usually typewrites 40 to 50 letters a day. With the two 15-minute breaks allowed in the eight-hour day, the work is completed in seven and one-half hours. Thus, as would be expected, the day's output averages less than a selected hour's work. Productivity decreases as the sustained period of time is lengthened.

Some secretaries are reluctant to judge output in their offices because they believe output varies greatly according to the type of material, the speed of the dictator, and the speed of the typist. These are bona fide reasons. A variety of material to transcribe—short routine letters, business reports, legal papers, and long technical letters—definitely makes it difficult to determine an average rate of transcription. Especially do these secretaries think measurement should not be made by number of discs transcribed since a fast dictator may have twice as much material on a disc as a slower dictator.

Many employers do not give pre-employment tests on the transcribing machine, apparently in the belief that the machine is easy to operate and that the stenographer will be able to use the machine efficiently with experience. When tests are given, some employers request only the transcription of one letter to determine the applicant's typewriting techniques, such as proper placement of a letter on the page, and to judge his spelling and vocabulary.

## Classroom Standards

Classroom standards, set almost invariably by the individual teacher, should reflect local employment requirements as nearly as possible. Usually machine transcription is taught in office or secretarial practice classes near the end of a student's secretarial education. His typewriting, spelling, vocabulary, and English skills have been developed previously so that only some practical experience with the processes of using the machine should be necessary. However, most teachers find a review of all these factors must accompany the machine transcription unit.

Many college and university students spend approximately 15 hours using the machine, while high school students may spend from 5 hours (acquaintance level) to 25 hours. To develop a usable office skill, 20 hours practice is usually recommended for high school students.

Grading plans are ordinarily similar to plans used in shorthand transcription classes with grades based on mailability and rate of transcription. For college students a grading scale considering mailable, correctible, and unmailable letters is often most feasible. After 10 hours' practice, college students might be expected to transcribe letters in a one-hour period at the rate of 25 or more words a minute for an A; 18-24 words, *B;* 14-17 words, *C;* and 10-13 words, *D.* Mailability is graded separately. One satisfactory grading plan for mailability when average-length letters are used is to give two points for a mailable letter, one point for a correctible letter, and no points for an unmailable letter. Using one point for each completed letter as total possible points, the possible points figure is divided by the number of points earned on completed letters to get a percentage score.

Some high school teachers grade the first week on the basis of a mailable letter receiving an *A* grade; 1 error, *B;* 2 errors, *C;* and 3-5 errors, *D.* Frequently high school grades are given on the basis of (a) the number of mailable letters transcribed each day and (b) a weekly 30-minute test on which words a minute is figured. The rate at the end of the first week for an *A* grade might be 12 words a minute and this rate raised each week 3-5 words.

Because each letter mailed by business today is estimated to cost approximately $2.50, mailability and rate of transcription are of prime importance in the office and, therefore, also of prime importance in the classroom.

## 4. Typewriting Standards for Office Occupations—Are They Realistic?

**JOE W. SAWYER,** Middle Tennessee State University, Murfreesboro

Standards have probably been studied, evaluated, and reflected upon more than any other area in typewriting. The chief problem in determining typewriting standards is that nobody knows for sure what the right standards are for the office. Most persons who have written on this subject are not completely sure either, but they have some ideas about it.

Various factors have contributed to some misconceptions concerning typewriting standards, but the all-inclusive use of the word "standard" and the unrealistic respect for the written word are the two factors which seem to predominate. Everyone has the right to define and to use a word as he pleases, but it should be remembered that a word which means everything means nothing. Standards should not be confused with techniques, devices, half-truths, and hand-me-downs. As for the printed statement, it may mean nothing more than the statement is in print.

At the risk of belaboring the obvious, standards which are to be real and meaningful must be flexible. The certain uncertainty of change suggests that there are no ideal or absolute standards to be followed by all in preparing students for office occupations. Typewriting goals and objectives cannot be reorganized and revised periodically on the assumption that the results will have any lasting value. Planning must be continuous and accompanied by a constant study. Students must be prepared for jobs that have not yet been created for an office of tomorrow that presently remains an enigma. Automation has revolutionized office procedures and, in many instances, the role of the typist. The ultimate effect that automation will have on the typewriting function is still in the realm of speculation. However, there is little evidence to support the few [illegible] typist has reached an impasse and that typewriters will soon become incongruous to the modern office.

Study after study has shown that typewriting ability is still the most-used skill of office workers. Secretaries and typists increased by 70 percent in the 1950's alone—more than three times as fast as all other clerical workers. Furthermore, the first annual *Manpower Report of the President* indicated that shortages of stenographers and other well-trained office workers with typing skills will persist for some time.[1] In 1960 there were almost 1.7 million women working as secretaries or stenographers, while women employed as typists that year totaled about 500,000, or 164,000 more than in 1950. Hundreds of thousands of women were in other jobs which required some typewriting.[2] (Incidentally, women hold two-thirds of all clerical jobs; and 95 percent or more of all typists in clerical occupations are women.) And according to projections made by the Bureau of Labor Statistics, the long-term upward trend in white-collar employment is expected to continue during the 1960's with an expected increase of 30 percent more in 1970 than in 1960.[3] When one considers that typewriting is the most-used skill of the three occupations in the clerical field which will be affected least by technological changes, he will realize that typewriting will continue to be an integral part of the office for many years to come.

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[1] Arnstein, George E. "The Impact of Automation on Occupational Patterns." *Recent and Projected Developments Affecting Business Education.* National Business Education Yearbook. Washington: National Business Education Association, 1964, pp. 39-50.

[2] U. S. Department of Labor. *Clerical Occupations for Women—Today and Tomorrow.* Bulletin 289. Washington: Government Printing Office, 1964. p. 9.

This leads to the question, "How do you determine realistic standards?" Considerable study, evaluation, and re-evaluation of the existing program must be made. How well is the existing program designed to meet the changing trends and developments in office procedures? What changes are necessary to achieve maximum typewriting proficiency in light of current research and current practice? These are persistent questions with no clear-cut solutions, but the many workable solutions and trends which are developing can be used as guides by business teachers in analyzing their own particular standards. With this in mind, the six suggestions that follow are offered as realistic observations of current developments for business teachers to consider in improving and strengthening their typewriting programs.

1. *Typewriting objectives have to be examined in light of the school's own resources and its own particular situation.* Use the business community in determining typewriting standards. "Subjective teacher-made standards, which were once the rule, are being supplanted today by objective standards determined by business in cooperation with business educators."[4] Follow-up studies, surveys, and personal contacts with businessmen (and former students) are necessary in determining these objective standards. A word of caution here, however—be sure to determine whether these standards are what businesses "want" or what they can "get." In almost all situations, business employment can be found for students having different levels of skills and ability. A realistic typewriting program is flexible enough to meet the needs of all the students.

2. *Production work is the heart of typewriting in preparing students for office occupations.* Production, not speed, is the end result of type-

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[3] Barry, Carol. "The White-Collar Worker in the 20th Century," *Occupational Outlook Quarterly.* Washington: U. S. Department of Labor, Bureau of Labor Statistics, May 1961.

[4] Liles, Parker. "Business Education Contributes to Vocational Competence." *The Business Education Program in the Expanding Secondary School.* Second printing. Washington: National Business Education Association, 1963. p. 26.

writing. Production is the ability to do something with the skill that has been developed. Materials should be updated, and procedures should be varied to reflect current practices and current concepts. Students should be made aware of the time factor in work situations by having to do much of their work under pressure. How long should production projects be? Production projects should be long enough to get the job done.

3. *Continue teaching the basic "hard-core" skills in typewriting.* Improvement in all phases of skill development should be a continuing process in preparing students for future office occupations. "Most job families in business require vocational preparation. No office will employ a secretary, accountant, typist, or stenographer who has not had preparation in the skills and ethics of his chosen field. Any statements to the contrary, no matter by whom made, are made in ignorance of the actual situation." [5] Too many of the business firms that administer tests to determine qualifications of the applicants for office positions use straight-copy typewriting rates as a screening device. This is a necessary evil which teachers of typewriting must be cognizant of even though there is little correlation between student performance on straight-copy work and performance on production work.

4. *Students must be taught to think.* In many instances, automation is gradually replacing routine work and the non-thinking worker. The use of problem-solving techniques in the classroom involving interpreting directions, analyzing and solving problems, and evaluating results are necessary to meet the increasing demand for more creative workers. Instill in the students the necessity and importance of good copy in all phases of their work. The ability to follow directions is a must! Instructions should be varied to develop this ability. Use hand-out sheets and case problems with printed instructions to provide realistic work experience (and prevent lecture classes all semester). Give any set of oral instructions only once. This practice not only helps the student but also prevents the teacher's giving instructions in a perfunctory manner.

5. *Greater emphasis should be placed on accuracy and the typewriting of numbers.* While Harm Harms concluded in both his original study and his follow-up article that there is no significant difference in the accuracy of the office worker and the high school student, he emphasized

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[5] Wanous, S. J. "An Evaluation of Curriculum Practices and Trends in Business Education." *Recent and Projected Developments Affecting Business Education.* National Business Education Yearbook, No. 2. Washington: National Business Education Association, 1964. p. 24.

that we must continue to develop thoroughly in our students a sense of the importance of accuracy in their work.[6] It is safe to say that Doctor Harms' observations are even more important today than when they were made. Rising office costs and more extensive uses of automative equipment have increased the need for higher standards of accuracy in typewriting. The increasing use of numbers in business correspondence and the rapid growth of materials best expressed through quantitative analysis have led to a renascence of interest in numbers and top-row proficiency. Top-row practice should be a part of the daily warm-up drills. Vary the top-row activities for realistic practice; and above all, reward the students for improvement.

6. *All standards have to be tempered with judgment.* It must be remembered that most standards are general in nature and are not always applicable in specific situations. Generally speaking, the business teacher has more knowledge of the business opportunities in his particular area than in any other area and is, therefore, qualified for determining realistic office standards. However, this does not mean that business teachers can become complacent if their standards meet the needs of their respective business communities. Students must be prepared for job shifting. It is estimated that now a person changes jobs an average of five to seven times in a lifetime; in the future, from fourteen to eighteen times. Considering the probabilities of job shifting, all trends and changes in office procedures have to be considered, regardless of specific circumstances.

# 5. Standards in Vocational Typewriting

**JOHN L. ROWE,** The University of North Dakota, Grand Forks

Any discussion concerned with standards in typewriting must necessarily be prefaced with a variety of considerations and qualifications. The typewriting function has changed, and it is "no longer an island unto itself." Thirty years ago the machine was primarily a copying instrument whereas today it is used almost as much as a writing instrument. Typists' activities are becoming increasingly varied. Related associated skills, knowledges, and competencies must be considered in a discussion of standards.

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[6] Harms, Harm. "Standards for the Office of the Next Decade." *The Business Education Program in the Expanding Secondary School.* Second printing. Washington: National Business Education Association, 1963. p. 72.

The following three competency areas will be discussed: straight-copy skill (speed and accuracy), production and application activities, and related knowledges and skills.

### Straight-Copy Skill Standards

Straight-copy skill is still widely used as a criterion measure of performance ability in both schools and employment. How fast and accurately one can type in words per minute is still considered by many teachers and employment officials as the major measure of typewriting ability. Despite what numerous critics have said about this singular measure, much validity can be given to this performance ability as a prognosis of success in an office situation.

It is not possible to apply that which we do not have. The ability to typewrite letters, manuscripts, tabulated problems, and any other application exercise is dependent upon one's pure straight-copy skill. How fast and accurately one can type is directly related to his performance in all application and production activities.

A typist with a skill of 60 words a minute on a five-minute timed writing (with no more than three errors) may type production activities at only 20 or 25 words a minute. If an individual types only 35 or 40 words a minute on straightcopy, his production rate would probably be 10 or 15 words a minute. The inability to produce more production-wise is due simply to the fact that he has not been taught specific knowledges.

Typewriting production activities vary in offices. One could not possibly, in most typewriting classes, teach the multivaried problems and activities typists perform. We must thoroughly teach the basic forms and activities and assume that the fundamental principles of application will transfer to other situations.

Some personnel managers prefer a person with a high basic skill; and when this person is employed, he will be taught the company's forms and styles. Some applicants are richly endowed with extensive knowledge of business forms and styles, but these individuals had to be retrained because the company had its own specific forms and styles. In several instances, highly knowledgeable typists were at a disadvantage because it was difficult to change preconceived methods of doing certain things.

Although the above discussion represents the minority views of office managers, it is necessary to consider their opinions. Their statements reveal that at best we should teach a limited number of specialized production activities. We should concentrate primarily and thoroughly on the selected fundamental principles associated with typewriting form setup and analysis. A major consideration, then, is to train a speedy and accurate typist.

Straight-copy standards in a vocational typewriting course should be as follows: 50 words a minute on a ten-minute timed writing and 60 words a minute on a five-minute timed writing.

Some employment officials still give ten-minute timed writings. Modern teaching methodology in typewriting rejects the practice of giving numerous ten-minute timed writings when developing skill. Nevertheless, this does not preclude giving some ten-minute timed writings for employment testing conditioning purposes during the final few weeks of the vocational typewriting course. Fortunately, a growing number of employment officials are giving five-minute timed tests.

Sixty words a minute for five minutes may appear to be a high standard for vocational typewriting classes. If a person is to type 50 words a minute on a test of this length during an employment examination (with all the attendant pressures, and the like), the candidate will probably realize about 50 words a minute. Research has indicated that a skill reserve, approximately 15 percent higher than that required, is necessary for passing these examinations.

Although the Civil Service requirement of 45 words a minute for five minutes may appear to be a somewhat low standard compared to many school standards, it is recognized that the pressures of the examination frequently result in a loss of speed from 10 to 15 words a minute. We should, therefore, aim for higher speeds in school than what is required on employment tests.

What about accuracy? Recognizing that errorless typists do not exist (even the champions make errors), an accuracy ratio in relation to time is suggested for school training purposes. For terminal standards this would be approximately one error for every two minutes as a maximum. For a five-minute timing, no more than two or three errors; and for a ten-minute timing, no more than four or five errors. These accuracy standards conform to that which is generally required on the various kinds of employment tests.

### Production Problems and Activities

It would be a pointless enterprise to set forth standards for typing letters, manuscripts, rough drafts, and other production and application activities unless elaborate qualifications were predetermined. Some of these qualifications or considerations would be as follows: (1) Would the typist be expected to make erasures and other corrections? (2) Would he be expected to proofread the material? (3) Would he make carbon copies? (4) Would the time involved in arranging the materials before the timing be considered?

Realistic production work would involve the above major considerations. Of what value is production work unless it is a finished product—with all errors corrected and the material proofread both on the original and on the carbon copy. To a limited extent, this steady-diet kind of training might have very restricted classroom value. If these qualifications were required, then the rates would be in turn much lower than straight-copy rates because to proofread adequately takes almost as much time as the typing. To make satisfactory corrections would take additional time, and to make the same corrections on the carbon capy would double the time.

To equate production activities with straight-copy skill has challenged teachers since typewriting instruction began, but a breakthrough has recently been made enabling one to develop production skill at approximately the same rate as straight-copy skill. This method or device is known as the production word count and is familiarly identified as PWAM.

Production typewriting involves the use of a large number of typewriter service mechanisms. These mechanisms have never been heretofore stroke valued or equated. More rapid production may be realized through a more efficient use of the service mechanisms. This is done by giving stroke value for service mechanism operation. For example, (a) Each underscored word is counted triply: once for the original typing, once for the backspacing, and once for the underscoring. (b) Each centered word is counted triply: twice for the half-speed backspace centering and once for the actual typing of the centered material. (c) Each extra carriage return (not every carriage return, but every extra carriage return) is counted as five strokes. (d) Each use of the tabulator is counted as five strokes. (e) A change of paper and the drop to the appropriate line of writing is counted as 40 strokes. (f) Special typing operations such as using the variable spacer, the ratchet release, the carriage release, and so forth are counted as five strokes each.

Teachers using the production words a minute formula in promoting greater production rates in typewriting have reported dramatic success with it. In straight-copy speed tests the student was rewarded for key stroking and spacing activities only. When the student learned that he would be similarly rewarded for service mechanism use (so common in all production activities), he immediately speeded up his production typing. The PWAM formula should be used by teachers desiring a formula to determine production rates in comparison to straight-copy rates. Studies have shown that if the PWAM formula is used consistently, production rates will eventually equal straight-copy rates. Therefore, standards in typewriting production should be the same as for straight-copy timed writings.

### Related Knowledges and Skills

The success of an office typist frequently depends as much upon related knowledges and skills as it will upon basic skill and production know-how. We should, therefore, have standards or suggested levels of attainment in these areas.

*Electric and Manual Typewriting.* Because of the widespread popularity of the electric typewriter in business (more popular than in the schools), it is imperative that an office education graduate be as much at home with the electric typewriter as with the manual. He should be competent in the skilled operation of special devices on electric typewriters. For example, he should know how to use the impression dial indicator to make multiple carbon copies, and where it should be set to make the best spirit master. He should be thoroughly skilled with the operative parts of at least one standard electric machine. In like manner, today's office typist needs to be operationally familiar with manual typewriters as they are still used, and in some offices are used exclusively.

*Basic Rules of Alphabetizing.* The typist needs to know the basic rules of alphabetizing so as to correctly itemize information in production typewriting. Without this basic knowledge, he would not know how to arrange material appropriately in column line order. If a typist must review the rules of alphabetizing before proceeding with an application problem, his typing production rate will be curtailed.

*Stenciling and Master Production.* Typewriting is the most important consideration in all duplicating activities. Special knowledges and skills are essential to type a good stencil and spirit master. This is typewriting information and should be taught in the typewriting class. The office practice or machines teachers' major responsibility is to teach the students how to produce copies on the machines.

*Composition Activities.* The typewriter is being used increasingly as a writing machine. Today's office typist composes as much as she copies.

She composes business letters, itineraries, purchase requisitions, and a multitude of other activities. Detailed instruction and practice should be provided so that the student will possess a know-how and confidence in composing vocationally at the typewriter.

*Erasing and Correcting.* Business would come to a standstill if office workers were required to produce perfect copy—copy without erasures or other corrections. The office education graduate should be thoroughly versed in correction techniques. She should be competent in using some of the newer correction materials such as tape correction and electric erasers. The old hand eraser is becoming more and more obsolete in offices. In like manner, the office education graduate should be familiar with crowding, spreading, and realignment procedures.

The foregoing are a few of the essential related knowledges and skills that characterize the efficient office typist. There are others, but space limitation prevents a thorough discussion of these items. Any discussion of standards would surely encompass these related knowledges and skills because they are essential to highly productive office work.

It is difficult to make specific recommendations relative to standards in typewriting because so many assumptions are prerequisite to a valid interpretation. At best, one can suggest specific aims primarily in terms of generalities. This article has dealt with this subject accordingly.

There is a great need for specific information concerning standards. In fact, a study should be conducted concerning recommendations for office production standards in major business categories.

## 6. Improving Shorthand Learning Through Emphasis on the Mailable Letter

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Do shorthand teachers agree on the desired student achievement in transcription? Are teachers agreed on the best ways to achieve the desired goals? What are the methods used to measure achievement? Transcription teachers would agree that shorthand and transcription students should be able to produce a professional-looking business letter. The letter should be well placed, typed evenly, and mechanically accurate. The student should be able to take pride in what she has accomplished. The employer should feel confident about the content and appearance of the letters that leave his office. How do we help students to accomplish these tasks?

First, there is generally a need for more time spent in transcription. The more experience a student has in transcribing, the better she will transcribe. But in addition to more time, other factors are important, too. Shorthand and transcription students will reach higher levels of achievement if:

1. They receive a firm foundation in punctuation and points of style, preferably through a good course in business English.
2. They concentrate on spelling, preferably in daily spelling lessons of about ten minutes in length.
3. They apply such techniques as the following to improve transcription skills:
    a. Having two pens available and accessible while taking dictation.
    b. Dating the bottom of the first page of the current day's dictation.
    c. Starting the dictation promptly with the dictator.
    d. Assuming the correct posture to avoid fatigue.
    e. Turning the pages in the shorthand notebook snappily. A rubber thumb or an eraser will help the student to do this.
    f. Reading the shorthand notes before beginning the transcription, putting in the necessary paragraphs and punctuation.
    g. Reading an entire sentence ahead before typing.
    h. Crossing out the shorthand notes as they are transcribed.
    i. Proofreading the letter before removing it from the typewriter.

Second, the student should be introduced to transcription gradually. At the beginning of the course she should transcribe from her textbook. Those "letters" need not necessarily consist of more than a salutation, body, and a complimentary closing. The letter should be read aloud in class first merely for word sense, then for punctuation, style points, and spelling; then it should be read again just to give the student the confidence she needs in the early stages of transcription. Gradually, more parts of the letter should be added such as the date, closing, and the like. The number of readings from the text is likewise reduced. As the students progress, they may read the letter from the text only once. The instructor then may preview and dictate the letter at a speed at which the entire class can get the dictation. Then the letter is read from the students' notes, and spelling, punctuation, and style points are again stressed before the students transcribe. Eventually new material is introduced with a preview and finally without any preview or any assistance.

What should the criteria be for determining a mailable letter? In order to set standards for mailability, perhaps it would be well to divide the types of errors into two categories; namely, major and minor errors. A major error might be a misspelled word, incorrect date, poor erasure, poor placement, too many substitutions, or the omission of an important word. A minor error might be an error in style, typing (spreading and squeezing), enclosure, or incorrect punctuation that would not cause confusion.

A perfect letter would be defined as one having no errors. A letter with even one major error, of course, would not be mailable. A letter with limited minor errors may be mailable. To grade such transcripts, a flexible method is needed—a method that can be used in high school and, with some minor changes, on the post-high school level.

A point system such as the following could be established:

Each *perfect* letter regardless of length—three points.
Each *mailable* letter regardless of length—two points.
Each *unmailable* letter—zero points.

Let us assume that four letters are dictated for transcription three times a week. At the end of the marking period the total number of possible mailable points should be calculated.

¾ of this number may be worth an *A*.
½ of this number may be worth a *B*.
¼ of this number may be worth a *C*.
⅛ of this number may be worth a *D*.

As an illustration, if four letters are dictated three times a week, the total number of mailable points for the week would be 24. If the marking period is for five weeks, and the instructor is able to give dictation the desired number of times, the total number of mailable points would be 120. Three-fourths of this would be 90, which would be equal to an *A*. One-half of this would be 60, which would be equal to a *B*, and so forth. This grading scale, of course, could be revised, depending on the level of class achievement.

At first glance one might think that speed would not come into consideration. On further observation, however, one can see that the more letters the student types, the more points she receives. The greater emphasis is where it naturally belongs, however, and that is on accurate, professional production.

This system of grading allows for unforeseen occurrences. If there is less transcription material dictated, the total number of possible mailable points would be less, and the student would not be penalized. The scale might also be adjusted for absentees.

The student should transcribe her budget of letters on letterhead paper using at least one carbon, and she should be responsible for typing an envelope for each letter transcribed. In this way she is duplicating the situation she will face in an office. When she has completed her budget, or when the time allotted for transcription is over, the student should assemble her material and grade her own work. She will thus be given the opportunity of finding her own errors and of analyzing her errors. The student should keep an analysis chart. These headings are suggested for the chart: "Date," "Letter," "Points," and "Analysis."

A duplicate of the student's analysis chart should be attached to the student's budget. In this way the instructor has the student's grading and analysis and is able to make corrections if any are necessary. The teacher also has a history of the individual's errors and weaknesses. An analysis of the errors may be concerned with date, inside address, salutation, identification initials, enclosure, carbon, envelope, erasure, insertion, omission, margin, placement, style, spelling, transposition, substitution, unfinished letter, and the like. When the student refers to her personal chart, she can easily ascertain her shortcomings in transcribing and can work on her own individual deficiencies before the next transcription assignment. For example, if a student's chart indicates a predominance of errors in omissions and substitutions, she needs more practice in taking shorthand dictation. The student may be able to avail herself of dictation discs. She may also be advised to concentrate on reading the shorthand plates in her text as quickly as possible without hesitation. These techniques should help the student to take more of the dictation.

If the student's predominance of errors is related to erasing, she will need to work on accuracy typing drills. The teacher is then able to assign remedial typing exercises. Thus, from the analysis chart, the student and teacher will make an appraisal of the individual's work by observing the types of errors that are made and determining the prevalence of these errors. From these data the teacher may then assign remedial work.

Before the student transcribes her next budget, the instructor should return the previous day's letters with any corrections and comments that might be necessary to encourage and assist the student. The student should have time to study the budget letter by letter to note her weaknesses.

The instructor may dictate the next budget of letters using the style points, punctuation, and spelling words that the students found difficult. In this way individual weak spots are revealed and overcome. The student is able to gain more points and to progress steadily. Her standards will be high, and she will be justly proud of her work when she accomplishes her goal.

Our aim in transcription is to achieve more professional-looking business letters. We can hope to accomplish this by setting up criteria for mailability, establishing techniques for attaining these standards, and developing a flexible but somewhat uniform grading approach to meet our needs.

# 7. Evolving Standards in Transcriptions

**JEANETTE LEWIS,** Copiague High School, Copiague, New York

Recently during a discussion of transcription standards with a friend I asked, "You follow evolving standards in grading, don't you?" Her reply to my inquiry was that she certainly does, but here ended any similarity of thought we may have had. She said, "Their transcribed letters are either mailable or unmailable starting with early transcription, but each week I count only the mailable ones to determine a weekly grade. I have a point system. This puts pressure on my students to work toward mailability, and the only justifiable basis for grading is the mailable transcript." From my friend's point of view, this system of grading meant that everything counts in the student's favor. My friend has a good motive, but is she going about accomplishing her objective of the mailable letter in the right way? Must the student be under constant pressure for perfect copy to be able ultimately to achieve this objective?

Transcription is the fusion of many skills already developed and also the mastery of some completely new ones. The easiest way to achieve transcription skill is to adopt evolving standards. Transcription is a skill which must be taught in a fashion that will enable the student ultimately to produce usable typewritten material from shorthand notes at a speed acceptable in the business office. We have made much progress since a few years back when transcription was taught in what is referred to as the "glass-wall" era. Formerly, while transcription was taking place in the typewriting room, the teacher conducted a shorthand class in an adjoining room; and the emphasis was on perfect copy. No attempt was made to develop speed at the same time that students were learning to transcribe usable copy.

From this type of training the student went directly into office work. Here it became obvious that these students were inadequately prepared so far as quantity of work was concerned and even the quality of transcripts might not meet office standards. Based on this experience, schools are beginning to offer instruction which includes emphasis on techniques rather than on perfect copy. After such emphasis, both speed and accuracy will evolve. From actual practice it was learned that transcription teaching is developmental; and grading is done in terms of objectives at the time of the drill, not solely in terms of the end product.

Another point to be considered in achieving the ultimate goal of transcription is teacher demonstration. All good teachers look for ways to make instruction more effective so that the learning process may be speeded up and may be more meaningful. In transcription the teacher must show the pattern of the expert—for he is the expert. The demonstration should be performed slowly and carefully. It should be accompanied by an oral explanation. The teacher points out each step as he proceeds with the demonstration and stresses the importance of time in the transcription process as one operation leads to another.

A proper comparison may be made between typewriting and transcription. Prior practice was for business educators to insist on absolutely perfect copy with no erasures. The new attitude in typewriting is on technique first, followed by both speed and accuracy drill, and this method produces efficient typists. Of course, we know students must erase, but there is a proper balance between perfect copy and copy with correction that is produced at an acceptable rate. Accuracy is still a very important principle, but it should be achieved concurrently with technique that develops speed. We have learned that perfect copy should be introduced gradually. The same measures are true with respect to the standard of mailable copy of the transcript. This is what we strive toward in setting evolving standards from which will emerge perfect copy. It is a reasonable assumption that as the skill develops, so perfect copy develops without an excessive number of corrections.

What constitutes mailable copy? There is no universally accepted standard for mailable work. What is mailable when students are just starting to transcribe is not mailable at the end of a transcription course. The only agreement seems to be that mailable work produced at a reasonable rate is the ultimate objective. The general idea seems to be that timed transcription is teaching toward this objective. Business teachers should be aware that the only way to attain the objective of usable copy at a reasonable rate is via a gradual step-by-step procedure.

In the beginning the teacher should set the stage. The early stage should be as simple as possible for the student. This is important in order to inspire self-confidence in the student and to accomplish the early objective of fluency of transcription. Each step in the transcription process builds a foundation for the next step. Obviously, therefore, a letter with hundreds of difficulties would not be a good one with which to begin transcription training. The beginning student should be led gradually over the hurdles of such technicalities as spelling, punctuation, English usage, word division, and capitalization. For instance, the teacher dictates three short letters for transcription. The objective is to have one of the three letters mailable only to begin to develop the concept of mailability, but corrections are not made by the student. The errors are simply pointed out and discussed. The emphasis here is on fluency of transcription and mastery of the techniques of transcription. The first grade would be given in terms of technique only.

The next link in the transcription chain is "mailability with correction." The letters, however, become increasingly more difficult and longer. The teacher may give full credit for those letters that can be mailed without any correction and partial credit for those that can be mailed with a small correction. If the letter contains a serious error, it is uncorrectable—therefore, unmailable—and receives a grade of *U*. If the letter contains an error which is minor and can be corrected without changing its appearance, it receives a grade of *C*, meaning it is mailable with correction. If the letter is perfectly transcribed, it receives a grade of *M*, meaning it is perfect copy. This step also establishes the concept that there is a difference in the nature of errors. The grading here is given in terms of the number of *C* letters and the number of *M* letters received in a particular week. As further incentive, the teacher may give double credit for the number of perfect copies produced. An important factor here is that the student should be instructed to locate errors through proofreading. At first there may be proofreading with another student to indicate errors, which are corrected through reinsertion of the copy into the typewriter. In the final stage, however, the student should do his own proofreading. After all, in a real office situation the dictator cannot afford to spend his time proofreading his secretary's work. By the time the next step is reached, most of the class is producing mailable copy; and the grading standard is now either *U* or *M*. To receive a weekly grade of *A*, for example, the student must turn in two-thirds mailable work.

Using evolving standards is the easiest and best way to teach transcription. Like typewriting, transcription is based on technique followed by speed and accuracy from which must emerge mailable copy at a reasonable rate of production. This is accomplished in three stages of transcription growth: (1) Emphasis on simple material to develop technique and fluency of transcription; (2) More difficult material with increasing emphasis on mailability and student recognition of weaknesses; and (3) Strong emphasis on mailable work only, produced at a speed commensurate with office standards. In each of these three stages, grading is done in terms of the objective upon which each stage is based.

Performance in the transcription class can be enriched and made more meaningful if there is understanding of the nature of the growth of transcription ability. The goal is reached through the use of evolving standards.

## 8. Standards for Written Communications

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Businessmen do have standards for their employees for various types of writing. Every office uses the business letter, and most offices of more than one hundred employees use the memorandum and report as well. There are many more types of special written communications found in the larger companies, but usually the writers of these types have had particular writing experience in their jobs.

There is evidence to show business teachers that we should help our students to prepare themselves for this office activity, which requires certain knowledge and skill difficult to learn on the job. Every article written about the standards for beginning office workers includes a comment at least on the need for a good background in English. Even though new workers may not be responsible immediately for writing, their writing skills are considered at the time of employment and during their early days on the job because of the practice of most companies to advance personnel from within the company.

Additional examples of the need for skill in writing communications are problems of composing letters, memorandums, and telegrams included in the secretarial skills section of the National Secretaries Association examination for Certified Professional Secretary and the section on written communications included in the National Legal Secretaries examination for the Professional Legal Secretary.

In this article needs of the businessmen are presented. These needs (the ones included are by no means all of them) have been learned through direct contacts with businessmen and through reading the comments of writers discussing the requirements of business for beginning office workers. Following the needs are suggestions to teachers for preparing students in the classroom to meet these needs. The suggestions can be used not only in classes of business communication or business English but also in all other business classes.

NEED. Businessmen want employees with a reasonably good command of the English language—both in spoken and written English as it is commonly used in business. Employees should know enough about business terms to catch errors in dictation and in material which they are copying on the typewriter. One employer complained that high school graduates did not know the difference between gross and net profit and, furthermore, had to keep running to the dictionary to look up words that they should have known before going to work in an office.

SUGGESTION. Vocabulary building is a never-ending process and something that should be tackled every day rather than just now and then. The words should be introduced to the students, spelling practice should be used as drills, and students should discuss the meaning of the words and be able to use them in sentences if they are really to learn the words and thus have them as a part of their own vocabulary.

NEED. A common complaint of businessmen is that their employees write letters that are too long. Too often the meaning of a letter is not clear. They would like the letters going out from their companies to be clear, concise, and complete.

SUGGESTION. Clarity can best be taught by emphasizing the purpose of the message. Ask students to write in one sentence the reason for writing a letter you have assigned them. Ask them to outline briefly the major points to be included in a report or even a letter or memorandum. The use of specific and concrete words for ideas rather than general words such as *situation* and *facility* will help the writer to give the reader a mental picture of his ideas in the message. Students can be encouraged to omit from sentences all words that do not contribute to the meaning of the sentence. In this way they will learn the meaning of conciseness. Completeness can be attained by including the necessary information—giving answers to questions asked or asking for information desired.

NEED. Employees who can write communications that are carefully organized are in demand.

SUGGESTION. Outlining is a worthwhile procedure in teaching students to organize their thoughts and use logical divisions and subdivisions for the material. Each written assignment should require an outline, even though it may be only a few words. Poor letters are often the result of no planning. Outlining reflects planning and organizing. The requirements for unity, coherence, and emphasis are easy to achieve through outlining, since each topic has a place and the relationship of the topics can be easily seen. The information is clear to the writer when he can observe it in logical order.

NEED. Businessmen are disturbed by the letters employees write that offend their customers. The idea of saying something without regard to the way of saying it (lack of tact) indicates no knowledge of psychology. The business teacher is not teaching psychology *per se,* but he must teach applied psychology in every one of his classes as it concerns human relations in the classroom now and in the business office later. Ask the students to put themselves in the reader's place to see whether they would enjoy reading the message. Is it interesting? Is it sincere? Is it directed toward the reader's wants and not the writer's wants? Communications textbooks call this idea the *you attitude*. Students will not be required to define the *you attitude* for their employers, but they will have to show the idea in their writing if they are to write good messages.

NEED. Employers want employees who are enthusiastic about the writing that they must do on their jobs.

SUGGESTION. Teachers can build enthusiasm for writing through giving assignments that encourage students to consider writing as a tool to express themselves, to tell someone else their ideas, and to give writing a real purpose. Ask students to write on topics in which they are interested, topics which will require library research and then outlining. Be enthusiastic about the topics they select; nothing is so contagious as enthusiasm. Short reports or memorandums written as a recommendation for a change in some school procedure can be developed enthusiastically by the class.

NEED. Many employees lack the knowledge of how to set up reports as well as which material to include or exclude.

SUGGESTION. In every class (regardless of the subject) teachers can assign a report, though it may be a short one. The preparation of reports, the mechanics of the format, how the format affects the purpose of the report as it is read and as it is used, can be taught.

NEED. Right or wrong, businessmen hire most of their employees with the idea that there will be possibilities for advancement within the company. Any supervisory or management position necessarily requires a certain amount of writing—in the form of reports or directives—to justify, recommend, or initiate changes in the business. Writing skill is needed by people who hold these positions.

SUGGESTION. Students should learn how to influence their readers through the use of psychology, clearness in presenting their ideas, and considering the knowledge and background of their readers. Through organization they can learn how to give their ideas the proper emphasis. Using the *you attitude* recently mentioned means to show the reader how he can benefit either directly or indirectly by following the writer's recommendations and thereby doing what the writer is trying to persuade the reader to do.

NEED. Employees are needed who can write under pressure. Often writing must be done between other duties such as attending conferences, receiving callers, or meeting the customers outside the office.

SUGGESTION. Have some writing assignments that must be finished in a limited amount of time, perhaps 15 or 20 minutes. So often students complain that they could accomplish a certain assignment if they had more time. Time, however, is at a premium in the office; and students must learn how to be efficient in their thinking and in their writing. They have to learn how to adjust their production to time limits, which involves a matter of selection and rejection of material to include.

NEED. Businessmen want employees who can express their ideas in writing. Often a businessman will tell an employee, "Your idea sounds good, but put it on paper for me so I can read it when I have more time."

SUGGESTION. Students should be given as much work in writing as the teacher can read. Time is at a premium for the teacher, also; but students learn to write only by writing. Time for other activities may have to be sacrificed; but regardless of the degree of automation, employees will always have to communicate.

NEED. Businessmen are often asking, "Why can't beginning employees type well? Why can't they spell?" The appearance of communications and intelligent content are important to the businessmen.

SUGGESTION. Many students never learn to proofread. They should be required to read everything twice: once for checking on the sense of the content and once for checking on spelling, grammar, and punctuation. Proofreading skill must be taught and developed, not just discussed.

NEED. Businessmen expect quality material written by their employees.

SUGGESTION. The word "revise" is almost repulsive to students. They hate to do anything over. They even fail to read the assignment they have prepared or do so superficially because of their anxiety to get on with something else—be it work or play. Teachers should require work to be revised and returned for further scrutiny by the teacher. Too little work of all kinds is done with the quality that the worker could give the job if he tried just a little harder. Teachers are not just requiring written assignments; they are also developing learning and working habits. The more perfection that is required, the more perfection will be received.

Although this article is concerned with only one of the four communication skills, the writing skill is one which students can develop if they are taught well by their teachers. Teaching writing is not easy, but some type of writing can be included in every business course. Students need a tremendous amount of practice to arrive at these standards set by business.

## 9. Standards of Office Etiquette for the Businesswoman

**YVONNE LOVELY,** Oak Ridge National Laboratory, Oak Ridge, Tennessee

The office has been established for the purpose of transacting company business. Today, with the emphasis on economy in operation without sacrifice of efficiency, management expects more of its employees than ever before. To serve the company most efficiently, the employee must be capable, but equally important must *appear* capable; and appearance is a combination of behavior and dress.

A businesswoman is now accepted for what she is—a lady in every respect. She blends with her surroundings, moves quietly and efficiently about her duties, and is courteous and friendly to all others with whom she comes in contact. She neither giggles nor guffaws, although a smile is standard equipment. She is poised and graceful whether sitting, standing, or walking. No longer is she expected to have masculine traits or viewpoints; her femininity is a recognized asset.

Etiquette for the businesswoman includes proper behavior and careful attention to personal appearance. In the area of behavior are manners as well as interrelationships with superiors, co-workers or subordinates, and customers or clients.

Behavior of an individual in the office is expected to create or maintain a favorable impression of the company upon outsiders and to promote effective and profitable operation of the company through cooperation with other employees. Behavior usually reflects the attitude of the individual; therefore, to exhibit correct behavior, the employee must have or must develop the proper attitudes. Some of the attitudes considered particularly desirable in a businesswoman are sincere interest in the company, respect for the management, and a spirit of friendly cooperation with others in the organization.

The businesswoman is always prompt and dependable. She reports to the office and leaves according to scheduled office hours, requesting time off well in advance and only when necessary. She observes the time allotted for the established "breaks" and lunch periods. She uses the restroom facilities to freshen up during the day, but she does not arrive in a shroud in the morning expecting to apply her morning makeup and remove her curlers on company time. She realizes that she is employed by management on the basis of her time devoted to company business, and she lives up to her part of the bargain.

Human relations is one of the most important areas in business. Getting along with others is an art which is essential to one who would remain gainfully employed. Of all the employees who are fired each year, from 85 to 90 percent are released because of their inability to get along with other people. A personnel director had this to say about a woman who failed, after a period of time, to fit into any one of several openings in his organization: "She's attractive and capable, but her social IQ is about a minus ten."

Many companies provide counseling service to help employees resolve personal problems; but the office is a place of business, not a psychiatric ward. One who is unable to adjust to her associates is very likely to be asked by her employer to try another environment.

Orders from superiors should be accepted with more than just good grace—the proper attitude is one of willing and cheerful assistance. Questions should be asked and details requested as necessary to understand the assignment. Complaints about the work are not made to the supervisor, and never to other employees.

The businesswoman treats every individual on any level of the business or social scale with courtesy, friendly helpfulness, and tact. She neither initiates nor encourages gossip, rumor, nor office smalltalk, realizing that conversation of this type can only disrupt the office routine or lead to lowered morale.

Interrelationships with co-workers frequently cause conflicts and problems in the office. The attitude of the other person or persons involved has no bearing upon the visible reaction of the businesswoman. No matter how unreasonable or petty the offender appears, he should be treated with diplomacy and the difficulty resolved at the earliest possible moment —preferably before the situation comes to the attention of management.

The customer or client is a guest of the business and is always treated with courtesy and consideration. He is right even when he is wrong; regardless of his attitude, the businesswoman retains her composure and controls both her temper and her tongue.

Oral communication is especially important for the businesswoman. Her voice is well modulated, her diction precise, and her use of the English language excludes slang and other socially unacceptable words. Prolonged social conversations, either in person or by telephone, are held outside office hours.

The businesswoman never chews gum in the office, even during break periods or lunchtime. One is expected to look reasonably intelligent in the office; anyone who believes it possible to look intelligent while chewing gum is invited to watch herself in the mirror and reach another conclusion. A further objection to the gum-chewer is that her words are frequently chewed also—this is most irritating to the listener.

Behavior and personal appearance are closely related. The individual who has a pleasant manner seems attractive to others, and one who feels that her personal appearance is attractive is more likely to be pleasant to others. Conversely, an unattractive appearance and a contrary disposition are frequently found in the same person. An employer may assume that a neat personal appearance indicates that neat work may be expected, whereas a sloppy appearance may mean sloppy work habits.

Despite the many cartoons with a point of view to the contrary, businesswomen are seldom employed on the basis of looks alone. Other qualifications being equal, however, the more attractive package of the required skills and capabilities will be selected. Not all women can be beautiful, but with the necessary attention to personal appearance any woman can be attractive. However, efficiency must not be sacrificed in favor of appearance. If the businesswoman requires glasses, she wears them. Discomfort decreases efficiency, and the aches and pains caused by uncomfortable wearing apparel are to be avoided at all costs.

Oddly enough, although most office jobs are relatively sedentary, the chief complaint of businesswomen is aching feet. This problem can cause not only a waspish disposition but also a drawn and haggard look about the face. Some women suffer on the way to and from work in beautiful but painful shoes—and don "fuzzy-wuzzies" at the office! Bedroom slippers have no place in the office, nor do flat heels. There are attractive shoes with the presently fashionable mid-heels which are suitable for the office as well as comfortable—provided they are bought to fit.

Of utmost importance is the appearance of good health. This means clear eyes (adequate sleep), well-groomed hair, clean skin, and a figure "within reasonable bounds." Proper foundation garments are very important to the woman who spends a great deal of her time sitting. They encourage proper posture at a desk or office machine, which means less fatigue over a period of time. They also contribute to an attractive appearance in face as well as figure—when body muscles sag, facial muscles also tend to droop.

Today's businesswoman considers makeup a part of her daily routine, and she is smart enough to be subtle in its use. Daytime eye makeup is now accepted along with rouge and lipstick, but any makeup which is obvious is too much. Too many layers of powder (in any of its several forms) cause a rather vacant, expressionless look—almost as though the person has had a face-lifting operation. "Mata Hari" makeup should be saved for candlelight, and so should perfume. Hair should be arranged in a becoming style which is neat and easily kept. Extreme styles are reserved for evening glamour. A woman who has "impossible" hair may find a wig or a hairpiece a satisfactory solution to this problem. Fingernails should be long enough to protect the fingertips, but not long enough to dig clams. Nail polish is optional. Dark-red or silver-white polish should be avoided; pastels are more suitable for the office.

The businesswoman must look neat and well groomed, all day and every day. She is expected to powder her nose, straighten a stray wisp of hair, and renew her lipstick from time to time to maintain an attractive appearance throughout the business day. Nobody, whether employer or customer, appreciates a woman who looks pale and disheveled, regardless of how efficient she may be.

Selection of business dress should be made on the basis of comfort (good fit) and suitability. Clothing should be conservative and durable —that is, not wilted by noon. Knit dresses or suits are perfect for business; and many other fabrics which will not wrinkle or sag, particularly the synthetics, are available. A wardrobe need not be extensive if carefully chosen for mix-and-match possibilities. Accessories can be changed effectively to provide variety.

With regard to color, black with a touch of white was at one time almost a uniform for the businesswoman. However, brown, navy and other dark blue, greens, and darker beiges are suitable today. White and pastels are avoided simply because they soil easily. "Wild" colors are poor. The "busy" look is too much in either fabric (checks, plaids, and stripes) or in design (ruffles, ribbons, buttons and bows).

Millinery, gloves, and handbags may or may not be items of concern for the businesswoman, depending upon her own particular situation. Jewelry, however, is an important part of any woman's ensemble. In the office, jewelry is simple and in good taste, preferably gold, silver, or pearl. Necklaces should be short and plain; pins may vary in size. Bracelets, if any, should be quiet (no tinkling bangles or charms). Small earrings are best. A large earring usually ends up on the desk—removed in talking over the telephone. Avoid the lopsided effect of wearing only one earring.

Standards of office dress are dictated, in part, as a matter of safety. Dangling necklaces or bracelets can become entangled in office equipment; broken beads rolling about on an office floor are as dangerous as an unexpected roller skate. Full skirts are a safety hazard if the hem is caught by the heel of a shoe or the caster on a chair.

Our American lady of business contributes a great deal to the efficiency of our offices and therefore to the rapidly advancing economy of our country. Her personal advancement is limited only by her own capabilities, supplemented by her knowledge and practice of the standards of office etiquette.

# 10. Office Standards for Male Employees

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When most of us think of office standards for initial employment, conduct, promotions, and the like, we tend immediately to gear our thinking to office situations involving women. The male office worker does not often get the publicity or attention he probably deserves.

With the sharp advancement of office automation, principally because of the growing numbers of electronic data processing systems in recent years, there is a critical demand for office-oriented young men. Because executives are increasingly aware of the need for continuity in office applications of all types of scientific management techniques, the demand for men to develop and administer these techniques is likely to continue to increase. When we refer to "continuity" in the application of systems, we think in terms of growing with these jobs, developing better ways of doing them, and in general, keeping the jobs going without having to prepare new employees to handle them. Men, because of their necessity for continued employment, may be more desirable in certain types of office positions where long-term development is desirable.

If young men graduates of high school or college business programs are to be considered for initial employment and promotion, they must meet the standards employers set. Many of these standards are applicable to all employees; others are pointed especially toward the man.

Obviously, satisfactory standards in the more important desirable personal traits of *character, intellect, attitude, personality, physical condition,* and *personal appearance* apply to all applicants for office positions. Ambition, initiative, and loyalty are particularly important characteristics for the aspiring male applicant or employee.

*Character,* even though the term is difficult to define, is one of the leading traits sought by employers. Standards for character are rather difficult to pinpoint specifically, because honesty, moral integrity, and other aspects of this trait are hardly capable of being measured in degrees. Employers are not interested in accepting character compromises. In order to get desirable initial employment and then be in a position to be recommended for promotions, the young man must conduct himself so there are no adverse reflections upon his character. The standards in this case are the highest, and employers do investigate for weaknesses.

The standards for intellect vary according to the requirements of the positions involved. As indicated earlier, however, the young man anticipates a long term of employment rather than a short one. For this reason, employers seek men with a level of *intellect* that will permit them to accept promotional opportunities as they appear. These promotional opportunities include management positions on all levels from supervisory to executive. Employers look for young men with this intellectual capacity to fill office jobs on various levels. Many executives have risen from clerical, accounting, technical (such as data processing specialists), and secretarial positions. They were able to do so because they possessed the intellect necessary to learn and to make proper application of that learning. Many employers use intelligence and mental alertness tests to make preliminary selection of employees and to gain an insight into employees' ability to understand and utilize ideas. Some of these tests are the Otis Self-Administering Test of Mental Ability, Psychological Corporation Test, the O'Rourke General Classification Test, Benge Test of General Knowledge, and the Wonderlic Series. The performance standards set for any of these tests vary with job requirements and projected job opportunities for applicants as well as with different employers. It is conceded generally, however, that male applicants' scores are examined more closely than are those of women. Because of the technical nature of electronic data processing, for instance, the prospective employee must have a better than average intellectual capacity as well as mechanical aptitude. Most of these better-paying positions are being filled today by young men.

Following character and intellect, probably the most desirable personal trait for any employee is that of an inspiring, progressive *attitude*. Once again because the man is expected to remain with a business for a long time, the standards for attitude are generally high. This does not mean that the attitude of the woman employee is not important, but employers seem to be willing to accept at least a difference in attitude between men and women employees. The young man who gets the better job or the desirable promotion regards his position as one in which he can be of real service to the organization. He is more than superficially interested in the welfare and growth of his company. He realizes that his attitude toward his fellow workers, his supervisors, and his customers will necessarily reflect in his job performance. Not only does the employee recognize this fact, but he can be sure the "boss" does as well. Both are looking for progress, and both know attitude can be one of the leading factors of job success. Many exceptionally capable and qualified employees, both men and women, are left in the fringe jobs rather than being promoted because they look upon their jobs as merely a source of income. Probably more important to the male employee is the fact that his own attitude controls to a high degree his happiness, which in turn will determine how long he will be willing to stay with his employer. That fact, then, will determine the level he is likely to attain in his career.

Standards for *personality* are not only difficult to set, but they may vary widely from position to position. In general, employers do not have the same thought about the personality of men as they do about the personality of women. It is not the usual qualities of grace, poise, charm, and pleasantness found in the desirable female personality that employers look for in the young man. Instead, they want a sensitive, friendly, nonassuming air free from conceit, loudness, overbearing presence, and gruffness. The necessary degree of such traits as introversion, extroversion, positiveness, and male charm depends upon the nature of the office work to be done. Obviously, a different personality is acceptable in a position of accounting clerk than in a position involving customer service responsibilities.

*Physical condition* standards also vary from one job to the next. Physical handicaps are not to be considered significant here since it is assumed that if men with such handicaps are employed, the employer recognizes the limitations involved. Employers expect both their men and women employees to maintain a physical condition that will permit them to be on the job with only infrequent absences. The greater the responsibility accepted by the employee, the greater the need for his presence on the job. If we can assume the male member of the office staff probably has aspirations toward greater responsibility, we can logically say his physical condition is an important consideration. Employers do, therefore, take more than a casual interest in the health of their workers, and the acceptable standards for men are generally high.

The standards for *personal appearance* may vary from office to office. The location of the office, its size, the nature of the business, and contact with customers all have something to do with what is required in the way of personal appearance of male employees. Physical characteristics are not the aspects of the person we shall examine. This is not to say that a handsome appearance is not a decided asset for certain job situations, but those who were endowed with less than "movie-star" features are not left out of desirable employment because of it. Good personal grooming, careful dress (according to the situation), and other appearance attributes, such as carriage and working posture, may be considered. There are always exceptions to any requirement, but generally good personal grooming is a must for a person to gain employment and advance in responsibility. As was indicated earlier, the personal appearance standards will vary according to such conditions as the location of the office. In a small office at a coal yard, for example, the male employee may not be expected to conform to the "spit and polish" grooming required in other places. Some of today's grooming fads, such as the unusual hair styles, have no place in any office, however.

There usually is not a problem of the male office employee's being overdressed as is sometimes the case with the young woman. The man's dress is likely to correspond to the nature of his duties. A coat and tie usually are worn by the male worker who does most of his work in the presence of customers or the public. If his duties seldom bring him in contact with these people, he may work without the coat. In a few instances, such as in the remote office, the man may wear a conservative sport shirt. In all cases the articles of clothing should be clean and well pressed. Most employers, too, like to see their young office men wear clean, shined shoes that are in good repair. As the responsibility of the man increases in the business, his dress will usually improve, also. For example, it is generally understood that the executives on all levels will certainly wear coats and ties, and they will also usually wear hats outside the office.

Many beginning jobs for young men call for *skill* in the use of a variety of office machines. Positions requiring machine calculations cover a wide range from payroll computations to statistical research, from invoice calculations to electronic data processing. Being competent in the use of these machines can be the factor leading not only to desirable employment but also to promotion. Duplicators, bookkeeping machines, and electronic data processing machines are all examples of machines that require considerable skill to operate. Men who have this skill are more likely to be employable and promotable.

The young man is seldom expected to have a high degree of proficiency in the stenographic or secretarial skills, such as shorthand and transcription. Few male employees work in positions requiring extensive use of these skills. Many men have jobs requiring typewriting skills in varying degrees, however. Many clerical positions that are filled by men call for the ability to typewrite. Usually a straight-copy speed of 50 words a minute is acceptable for most of these jobs.

Men who meet the standards outlined here in regard to character, intellect, attitude, personality, physical condition, personal appearance, and office machine skills are being sought actively by employers in all lines of business. These men are wanted in the office where they can learn the business operations firsthand. They can be in excellent position for promotions, to move to better jobs with other companies, and to achieve greater personal satisfactions in their work. Let us set high standards for male office workers and publicize the fact that businesses are aggressive in seeking these men for the positions that offer unusual promise for the future.

## 11. Standards of Promotion for Beginning Office Workers

**ETHEL R. CHRISMAN,** Southern States Cooperative, Inc.,
Richmond, Virginia

One of the problems facing American businessmen today is the scarcity of promotable clerical workers. Employers invest huge sums of money recruiting, screening, and training new employees every year. Future stenographers, secretaries, and clerical supervisors will be drawn from this group. Since a large investment in time and money is involved in these promotions, an employer must make every effort to select the best qualified employee for advancement. How does an employer decide who gets the promotion? Let us analyze the reasoning of a representative American employer, which we will call the Davis Company, by comparing the careers of two clerical employees.

Linda and Barbara began work as clerk-typists in the offices of the Davis Company, a large private industry. Their preparation for the beginning job had been similar. They had graduated from Central High School, both ranking scholastically in the upper third of the class. The same Davis Company supervisor assigned and checked their work each day, correcting, encouraging, prodding, and sometimes consoling with the patience born of guiding inexperienced clerical workers.

The department head who placed Linda and Barbara in their jobs had ambitious plans for their promotions to higher levels of responsibility. He followed carefully their week by week progress reports. The training program began in a familiar routine pattern, with each participant completing assignments on schedule. Differences in achievement were subtle at first, but they became more pronounced as the program advanced.

### Standards for Promotion

The careers of Linda and Barbara up to this point would appear to be almost identical. Then, a stenographic job vacancy occurred. Barbara got the promotion. If asked why, the supervisor would have answered, "I recommended the one who gets the work done the way I want it done." Beneath the disarming simplicity of that answer lie unwritten but universally recognized rules of almost every business office—the standards for promotion. It was not an accident that Barbara got the promotion. She earned it by surpassing the standards as indicated in the list that follows:

1. Barbara possessed the level of intelligence necessary to be trainable for higher clerical responsibility. She tried conscientiously to use her intelligence.

2. She had likeable personality traits which made it possible to work with and through her fellow employees. Her manner was consistently friendly but businesslike with all employees of the company no matter what their rank.

3. She maintained a reasonably good appearance and was always appropriately dressed. Barbara did not wear unusual clothing or makeup which distracted other employees from their work; but, her style was up to date.

4. By the time Barbara was a stenographer, her sustained typewriting speed ranged from 45 words a minute to 60 words a minute with one to five correctable errors. Her shorthand speed was from 80 words a minute to 100 words a minute. She had learned to transcribe a mailable letter direct from the transcription machine. She was versatile enough to enjoy the variety of using both methods in the same hour.

5. She turned out a mailable letter with no misspelled words and no errors in grammar within minutes after receiving it from the dictator. Good communication skills are essential tools of successful clerical workers. Barbara set a good example for her fellow workers (including the boss) by speaking and writing English appropriate to American business usage.

6. Barbara could add, subtract, multiply, and divide numbers accurately. She knew how to use machines, such as the calculator and 10-key

adding machine. In fact, one of Barbara's characteristics was her obvious delight in learning new ways to do her job. Barbara realized that office work was not an end in itself—the job existed to accomplish the purpose of the organization. She did not cling to traditional methods.

7. Barbara recognized the value of the papers she handled, and she knew a document was worthless if it could not be produced at the moment needed to prove a point. She had developed methodical accuracy in filing.

8. Barbara regarded her high school diploma as the cornerstone of her continuing education. She welcomed the opportunity to attend training sessions and evening school classes in subjects pertaining to her work.

9. She had developed many interests outside her job and led a wholesome social life which included Davis Company employees as well as friends working for other organizations. But, during working hours, Davis Company business had first claim on Barbara's attention.

10. Barbara left her personal problems at home. She did not bring her latest crisis into the office for others to share. Also, she did not imagine herself to be a psychiatrist and attempt to solve other employees' problems during the coffee break.

11. When necessary, Barbara could speed up her production to meet unexpected deadlines. She accepted annoying distractions and a heavy work schedule as part of an office job. She held up well under pressure, and did her part to keep the work moving smoothly.

These standards emphasize the fact that manual skills are not the only important qualifications of office employees. Most employers consider the skill standards stated above in numbers four through seven to be minimum requirements for promotion from clerk-typist to stenographer and from stenographer to secretary. With these minimum skills, a candidate should be able to produce the volume of clerical work required in most offices; however, she may be ineligible for promotion because she does not meet one or more of the other standards. Many capable workers are bypassed because they do not work cooperatively with other people, or are careless about their physical appearance.

Much more is expected of the secretary in American business offices than merely producing a given volume of typewritten material. She must be capable of understanding the significance of what she is doing. She must know enough about the work of her employer to be able to detect errors—and she must be a contributing member of the office team.

The minimum standards will vary from one organization to another and with the level of job responsibility. This is the reason most employers do not have written standards for promotion. A notable exception to this statement is the federal government which has written qualification standards for promotion.

### Why Was Linda Bypassed?

Linda was genuinely disappointed that she was not promoted to stenographer. The department head and the supervisor are aware of Linda's attitude, and great effort will be made to correct her deficiencies. They made the following list of negative standards which Linda must change to positive standards if she is to be considered for the next promotion.

1. Linda's level of intelligence and experience was similar to Barbara's, but she did not apply her ability to the job at hand. When faced with a decision, her first move was to ask the supervisor what to do. The supervisor often sensed that Linda really knew the answer to the problem, but wanted reassurance that she was "doing right." During the initial training period the supervisor expects to answer questions, repeat instructions, and give close attention to small details of training. After the employee successfully completes this training phase, she is expected to work on her own initiative. Linda's superiors prefer that she make an independent effort to solve problems even at the cost of some mistakes. This is a necessary part of the learning process.

2. Although Linda had many attractive personality traits, her behavior was somewhat inconsistent. One day she was friendly, but the next day she might fail to say "Good morning" to her fellow employees. On occasion, Linda spoke and laughed in a loud voice.

3. Her grooming standards fluctuated from day to day. One day she was well dressed, but the next day she might take no interest in her appearance. She was the first to wear a new style which may or may not have been approved office apparel.

4. Linda's typewriting and shorthand skills were above average. She preferred the use of shorthand over transcription machines to produce correspondence. She was slow in accepting new methods because she believed they were less professional than those she was taught in school. Linda failed to realize that office work is a constantly evolving process, and that employees must develop their skills along with this evolution. Being flexible enough to shift from one set of duties to another is the mark of successful clerical employees.

5. She was careless in proofreading her own work and often delivered a completed assignment containing transpositions and other mistakes. Consequently, the supervisor does not have confidence in the reliability

of Linda's work. Linda complained that the supervisor was "picking on her" because her work was rejected more often than that of the other clerk-typists. She felt the supervisor was unnecessarily meticulous.

6. Linda considered filing a tiresome chore. She handled so many papers to which no further reference would be made that she could not imagine they would ever be important to anyone. The subject of the correspondence made no impression on Linda's memory because she took no interest in the business transactions; therefore, it was difficult for her to follow the sequence of events leading to a certain file. It seemed to Linda that the boss demanded only that *one* document she had misplaced.

7. She believed that her business training in high school was adequate for her job and was not interested in further education. She did not take the job seriously enough to be willing to invest her time and effort in improving her qualifications. Linda did not regard her job as a career; it was a stopgap until she married. She did not recognize the fact that she would probably work after marriage.

8. Linda's social life took precedence over her job. She engaged in long personal telephone conversations. She resented the supervisor's telling her she must limit these calls and not encourage her friends to call her at work.

9. Linda could not resist describing her personal problems to anyone who would listen. These conversations were highly entertaining to others and often caused misunderstandings. Many people had a distorted impression of Linda because they had heard second edition versions of these conversations. Linda could not always be trusted to keep a confidence. She could not overcome the temptation to tell the other girls the contents of a confidential memorandum she had typed. Her indiscretion caused the Davis Company some embarrassment.

10. Linda frequently used headaches as an excuse for errors. She tossed aside the suggestion of her supervisor that the cause of her headaches should be determined by a physician; also, that she try eating a more substantial breakfast than the usual cup of coffee which Linda considered adequate for beginning the day's activities.

If we had to sum up all these standards under one heading, we could describe it this way: It is an electric mixture of energy and interest possessed by some individuals and not possessed by others. It enables those who have it to accomplish their goals successfully. Perhaps it is a measure of their ambition, interest in the organization for which they work, and most of all, confidence in their own ability.

# 12. Standards for Promotion of Office Employees

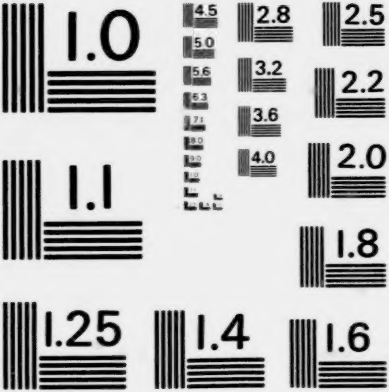
**KATHLEEN BARNARD,** The Loop Junior College, Chicago, Illinois

Definite standards should be used as an aid in selecting office workers for promotion. Standards for promotion in one business may differ from those of any other because of specialized needs and organizational framework. Therefore, it is the responsibility of management to determine standards based on its own company needs in general and departmental needs in particular. One set of blueprints will not suffice for all business organizations. Using clearly defined plans for advancing workers is one means of keeping in step with current business conditions.

Business today is a highly competitive and efficient society. Supply has surpassed demand in many commodities and a variety of unrelated business organizations now compete for the consumer's dollar. Business is still motivated primarily by its quest for profit, but there has been within the past few years a new approach toward attaining those profits. The solid, growing business firm is following a carefully developed route toward its goal of determining and meeting customer needs in the most efficient manner possible.

Businessmen now recognize the importance of running their organizations efficiently. Not only do they want satisfied customers, but they also want happy, productive employees. To get the most from the combined forces of men, materials, and machines, management must plan, organize, and control wisely and scientifically. Business needs employees who consistently maintain a high level of top-quality production and who are concerned with the over-all goals of the company. Production must be maintained through the willingness of the employee to cooperate with management. Within the employee, there must be the desire to reach his own greatest productive capacity and to see his firm reach the ultimate in its field. For self-motivation to function at its fullest, employees must know (a) that they are being treated fairly, (b) that their work is being recognized, and (c) that they have the opportunity to rise within the company according to their contributions.

According to recent population, business, educational, and technological trends and predictions, more and more white collar workers will be employed in the future. They will be working together more closely than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MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A

ever before. Already, the number of white collar workers exceeds that of blue collar. How can management challenge and motivate office employees so that they will aspire to perform to their optimum? How can personal incentive be strengthened? How can the high rate of turnover be reduced? How can manpower be used to best advantage? How can excessive waste in time and money be eliminated? How can duplication of efforts be avoided? Where can operational costs be minimized? These problems are facing management today. Perhaps setting up definite standards for promoting the workers would alleviate some of them.

### Reasons for Standards of Promotion

Through standards, the manager can do a better job of evaluating employees. As business grows, jobs become more specialized. Job evaluation and employee ratings become more and more necessary in order that each position is filled with the worker best qualified to perform that particular function. In many large organizations promotability may depend upon the ability of a worker to do one or a few functions well. Management's attempt to place the right man in the right job could be strengthened with more fact and justified opinion and less fiction. There would be less likelihood of over-emphasizing one particular strong trait of an employee and under emphasizing his over-all performance and his job requirements. For instance, a manager may be over-sold on an employee because of one outstanding quality and fail to consider other factors. Simply because a woman is an excellent typist does not mean that she could manage the typewriting pool. Having written standards for promotion to this position should enable the manager to fill the vacancy with the person most likely to succeed.

Through scientific job placement the employee is given a sense of contribution and a feeling of value toward the joint efforts of the organization. Needless to say, this serves as a powerful stimulant to most people. It instills in them the drive and the will to progress even further. At the same time, management profits in that it is getting the maximum from the employees.

Worker turnover tends to be low in those organizations in which the employees feel capable of doing their jobs well and when they realize their role in the over-all operation. A feeling of worthwhileness goes far toward the satisfaction of man. Promoting employees according to established standards would have the following advantages: (a) wise use of manpower based on employee placement according to special talents,

(b) lower operational costs and reduction of waste by utilizing best qualified people in highest-level positions, (c) high morale because of employees' awareness of management's recognition, and (d) employee stimulation to meet standards for higher-level positions. As business grows more production conscious, it is becoming increasingly important for management and white collar workers to acquire a oneness of purpose. To achieve this, there must be an attitude of mutual interest and cooperation. Each is responsible to the other.

### The Responsibility of Management

Management is responsible to white collar workers for setting up definite goals and objectives of the company. Each employee should understand the importance of his job and its relation to the over-all picture. Employees should know what is expected of them through written job descriptions, job classifications, and job analysis. If job classifications are to be effective, they must be realistic and they must be kept up to date. Management is responsible for equalizing work loads and eliminating duplication of efforts. Setting up standards for promotion aids management in placing employees where they can be most effective.

Through both formal and informal interviews, managers can keep workers informed of their progress and can make suggestions for individual improvement. Positive leadership motivates and stimulates personnel by treating them as important human beings and by letting them know that their work is necessary and appreciated. Developing in each worker the strong personal incentive—the human will to work—is the goal of the good supervisor. A free flow of upward and downward communication must be maintained to fulfill the needs of both management and employee.

Workers need to know that standards for their job exist, what those standards are, and how they can be achieved. There should be a minimum-maximum salary range within each job classification, and the employee should be granted salary increases within this classification for work well done. When higher-classification positions are available, promotions should be given to the best qualified. It is well to maintain a policy of promoting from within the company and from outside it. A new employee may stimulate other office workers with new ideas; promoting from within aids in retaining valuable employees and serves as a motivating force for those who wish to grow with the company. Workers will continue to prepare themselves if they feel there is opportunity with the company.

The manager should serve as a good example to his work force. His qualifications will be observed and his initiative and attitude will be reflected and imitated. Establishment and maintenance of rapport cannot be stressed too greatly. Exhibiting good human relations in his daily contacts is extremely important.

### The Responsibility of White Collar Workers

After the goals of an organization have been established, it becomes the duty of each individual employee to cooperate completely with his fellow workers and with management to attain them. The employee has to take certain skills into the business with him; then he is responsible for increasing and developing those skills. The growth of the individual worker is generally in ratio to his contribution. His promotion depends on many different factors. The major one, of course, is the need for office workers at higher levels of employment. Theoretically, the employee who has the requisite ability, initiative, skills, and knowledge will continue to win promotions. In actual business situations, there must also be a need. At the present time, there is a real shortage of well-qualified office workers, especially executive-caliber secretaries. White collar employees who will take an active interest in the business as a whole in addition to their own specialized duties are much in demand.

Winning promotions in business today entails the acquisition of a company philosophy. It should originate at the top-management level and should be funneled down through the various divisions and departments to each individual employee. The company-minded employee performs the duties of his position efficiently, but his responsibility does not end there. He realizes that performing duties that will save his employer's time saves his company money and makes him increasingly valuable. Learning how to perform efficiently the duties of his peers also enhances his role. The employee is responsible to his company for developing certain requisites for success. They are as follows: (a) The development of good personal qualities, (b) The development of job know-how, (c) The development of special skills and knowledge needed, (d) The utilization of general ability, and (e) The desire for progress.

*The Development of Good Personal Qualities.* One of the most important requisites for success is the acquisition of a good business attitude. Some call it professionalism; others label it personality or leadership, company-mindedness, initiative, dependability, foresight, or persistence. Regardless of the nomenclature that is applied, it is that intangible trait that goes far beyond the description of the job and, for that matter, beyond the call of duty. The employee who has the quality is career minded, finds his work challenging, and exercises much individual initiative. He is sensitive to the needs of those around him—especially those of his immediate supervisor. Through his own initiative, he realizes what needs to be done and performs a wide variety of duties without being instructed to do so. He understands when he can and when he cannot make decisions. While he isn't afraid to make them and, for the most part, he uses good judgment, the wise employee does not overstep the bound of his authority by attempting to make decisions which should be reserved for his employer. It is evident that his work is a very important part of his life, and he takes pride in working for his company.

Loyalty is another important quality. Not only is being able to keep company confidences an admirable trait but it is also a requisite to many positions. The employee who seeks recognition by divulging company secrets should not hope to achieve satisfaction through business promotions. The dependable employee listens carefully to instructions and does the job right the first time. He can always be counted on to follow through. Since he does not trust his memory, he seldom needs the excuse, "I forgot."

The employee with a future is conscientious in his work and he welcomes constructive criticism. In his appraisal of others and in his dealings with them, he is fair and honest. Needless to say, he has an excellent punctuality and attendance record; also, he is always well groomed.

*The Development of Job Know-How.* Before an office worker is promoted, he should not only thoroughly understand and efficiently perform duties entailed in his current position but also he should have acquired as much know-how as possible in other jobs. For instance, he should be able to "fill in" for others without confusion and should use every opportunity available to him to assist his supervisor and his associates. The attitude "I am here to assist my supervisor in any and all ways" will surely help him to attain a promotion.

*The Development of Special Skills.* Though job requirements differ, there are certain requisite skills and knowledges needed for all levels of office workers. The ability to communicate both orally and in writing is extremely important. For instance, in correspondence, the following techniques should be developed: (a) considering the reader's point of view, (b) adopting the "you" attitude, (c) portraying friendliness and courtesy, (d) using about the same approach as in a face-to-face conversation, (e) using good grammar, (f) understanding the situation, (g) getting to the point immediately, and (h) being clear and concise. Correct use of English mechanics such as capitalization is beneficial regardless of job classification. Also, the ability to put other people (employees at all levels as well as customers, clients, or visitors) at ease through friendly business conversation certainly is an asset.

Knowing how to typewrite is a plus factor for office workers. True, some get by without it; but those who have developed this skill find it useful. Employees who spend a considerable amount of time at the typewriter should not be content with a minimum skill. They should strive to typewrite at a fast rate of speed with control. Self-competition on their own production work will do much for them.

One of the main considerations for any office worker is, "What does the job require?" And then he should attempt to produce more. For instance, if writing shorthand at 100 words a minute and transcribing it at 30 words a minute is required to handle a certain stenographic job, the employee should not be satisfied with that minimum.

Most office workers find occasion to make use of skills and knowledge that they have acquired. Even though it is not used daily, how helpful is the skill on, let us say, the ten-key adding machine! Those who understand basic filing rules find this knowledge useful though few of them serve as file clerks.

*The Utilization of General Ability.* The employee is responsible to management and to himself for using his intelligence. He should be able to grasp situations quickly, to adjust to new circumstances, and to think on his feet. Adopting the employer's company philosophy is a requisite to his success on the job. The ability to perform well is of little benefit to those who are unwilling to devote themselves wholeheartedly to the company cause. Conversely, those of average ability with a company-minded attitude are an important asset to the organization.

*The Desire for Progress.* The employee who desires to grow in his job will use all available opportunities to learn more about his job and his organization. He will find ways in which he can improve in order to help his organization reach its goals. A broad educational background tends to increase the flexibility and to widen the potential promotion scope of the worker. Those who desire progress should realize that their education (formal and informal) is a continuous process. Ordinarily, regression has set in when an office worker adopts the attitude that he knows "all."

Management must determine what it needs and what it can expect from its employees before a rating standard can be developed. Rating standards must vary according to the needs of different organizations.

It should be emphasized that standards serve only as an aid in recognizing those traits which qualify an individual for promotion. Well-planned standards can lead to objective consideration of all employees for possible promotion. Standards for promotion of one level of workers would differ somewhat from other levels. The following list contains many general qualities and rating factors which could be used in setting up standards for promotion:

*Personal Qualities*

Has good company and business attitude
Is loyal and dependable
Cooperates with superiors, peers, and subordinates
Welcomes constructive criticism
Displays initiative
Is well groomed at all times
Has good attendance record and is punctual
Is fair, honest, and flexible

*Job Know-How*

Thoroughly understands and efficiently performs present job
Requires little supervision
Efficiently performs various duties at peer and superior level
Can "fill in" for others without confusion.

*Skills and Knowledges*

Has well-developed skills needed for the job
Continues to develop skills and acquire knowledge for self-improvement and for increased efficiency to company

*General Ability*

Uses intelligence and good judgment
Is alert and grasps the situation quickly
Adjusts easily to new office situations
Has ability, confidence, and initiative to make wise decisions
Has adopted employer's company philosophy

*Progressive*

Is company-minded and inspires others to be so
Exerts leadership qualities in line with company goals
Gets personal satisfaction from performance of job
Is production conscious and inspires others to be so

Inspires quality of teamwork, cooperation, and unity in others
Understands, believes in, and promotes company philosophy
Has learned as much as he possibly can about the company
Realizes the importance of his own continuous formal and informal education
Is aware of business conditions and trends in general and also of those within his company

*Job Aspirations*

Prepares for long career with company
Fulfillment of personal goals and objectives will enhance employee's value and will promote the company.

These qualities used in considering personnel for promotion can be evaluated by establishing some sort of point system or merely by noting the strong points and weak points of the employee along with suggestions for improvement and recommendations for promotion.

# 13. Standardization of Professionalism for the Secretary

**MINA M. JOHNSON,** San Francisco State College, San Francisco, California

Many of today's college-trained secretarial students will be tomorrow's Certified Professional Secretaries. A knowledge of the program, shared by teacher and student, will help to shape the thinking of both. The attainment of the professional status of Certified Professional Secretary should be the desire of all experienced secretaries. No matter what the specialization of the secretary—legal, medical, technical, educational—a core of common knowledge is basic to all. This "core" constitutes the content of the examination that must be successfully completed before the title is attained.

*What is the CPS examination?* The examination consists of five objective-type tests in the areas of human relations and personal adjustment, business law, business administration, secretarial accounting, and secretarial procedures. A sixth production-type test is in secretarial skills. The examination is given on the first Friday and Saturday in May of each year at accredited four-year institutions of higher learning throughout the country. In places where four-year colleges are not available or where the number of candidates exceeds their facilities, two-year colleges may be used.

The first examination was administered in 1951; in the 16 years in which it has been given, 3,590 secretaries in the United States, Canada, and Puerto Rico have been certified. This figure is roughly one-third of the number who have ever attempted the examination.

*How is the examination constructed?* With the exception of the secretarial skills test, the examination is prepared by committees of Certified Professional Secretaries under the leadership of one of the educational members of the Institute for Certifying Secretaries, with the help of a trained test consultant. As new ideas emerge, new and different roles are assumed by office workers, and automation changes the work done in offices, these changes are reflected in the examination because it is constructed by employed secretaries, alert to the business world around them.

The skills test is prepared by a leading business educator in the United States and is given a "trial run" in two parts of the country before being incorporated into the examination battery. The complete examination is reviewed painstakingly, item by item, at a review session of the Institute before the examination is ready for administering.

A statistical analysis of the difficulty of each item is kept and studied yearly. Because approximately 50 percent of the items are used again, copies of past examinations are not available for study. The secretarial skills section, however, is published in *The Secretary* magazine each year since this test is completely rewritten yearly.

*How should one prepare for the examination?* Many colleges and universities sponsor study courses for interested secretaries, on a "review" basis; many secretaries enroll in regular college-credit courses; area or city groups (often affiliated with the chapters of The National Secretaries Association) may conduct study sessions. A detailed outline of the areas included in the six parts of the examination is available from the Institute for Certifying Secretaries, the certifying body that is a department of The National Secretaries Association (International). The Institute (composed of six educators, six management men, six CPS-NSA members, a Canadian educator, and the international president and past president of NSA) neither suggests nor sponsors any study courses leading to the passing of the examination because of ethical considerations. The Institute believes it wise to keep examining and certifying activities separate from training and education activities.

The Institute believes a secretary should study for the broad, general fields covered by the examination in order to be equipped in the best possible way to meet the needs of the business offices of today and tomorrow. An information packet may be secured from the Institute for Certifying Secretaries, 1103 Grand Avenue, Suite 410, Kansas City, Missouri 64106. A bibliography of books and periodicals that may prove helpful for study is also available from the Institute.

*Who may qualify to take the examination?* Any man or woman who meets the education and experience requirements outlined below may apply. An applicant need not be currently employed nor a member of any secretarial organization. Age is no limitation. Specific experience and educational background information must be submitted and will be verified for each applicant, as follows:

high school graduation and 7 years of experience
1 year of college and 6 years of experience
2 years of college and 5 years of experience
3 years of college and 4 years of experience
4 or more years of college and 3 years of experience.

Business college work, if of sufficient duration, is acceptable; only secretarial experience is counted as meeting the qualifications. At least 12 months of this experience must have been with one firm. A complete statement of qualifications and an application blank are available from the Institute office.

The college-educated secretary undoubtedly has a background of study that includes economics, law, accounting, business administration, and secretarial procedures and skills—she may need only the years of verified secretarial experience before she qualifies to sit for the comprehensive examination. The high-school trained secretary, because of her less extensive study background, will need more experience and perhaps further study to prepare for the six sections. The business school graduate also may need additional study before she is qualified to sit for the examination.

*What are the benefits of the CPS?* Is CPS worthwhile? Letters and comments from Certified Professional Secretaries attest to the personal satisfaction realized from setting an educational goal and meeting a professional standard. Letters and comments from those who have attempted the examination but who have not passed it indicate the rewards of self-disciplined study, better job performance, and the broadening of educational horizons. Some CPSs have received increases in salary; others have been promoted to positions of greater responsibility and challenge; some have had their expenses paid to attend conferences, seminars, and meetings formerly reserved for the members of the management team. In some companies, of course, no recognition of any kind has been evident—a situation that is unfortunate but that must be recognized.

Employers of Certified Professional Secretaries often write with high praise of the resourcefulness and excellence of their CPS secretaries and administrative or executive assistants. Many employers realize the value of a member of the management team who, in addition to knowing the stenographic skills, can think *with* the employer and *for* the company, and to whom responsible assignments can be given with the assurance that they will be carried through faultlessly.

The CPS designation has resulted in the securing of teaching positions formerly reserved for those with advanced academic degrees only and in promotion within the teaching field in lieu of other academic degrees. The U.S. Civil Service Commission recognizes the designation in its promotional policies and its merit system.

Many secretaries realize the importance of a professional standard; many employers are aware of the excellence of the CPS; personnel and employment managers are slowly recognizing the meaning of Certified Professional Secretary. In recent months several excellent informative articles explaining the Certified Professional Secretary program and mentioning "CPS" have appeared in various publications read by management. The demand for Certified Professional Secretaries is growing and will mean continued growth of the certifying program. To supply the demand, the top secretaries of today and tomorrow are and will be those who proudly and responsibly wear the CPS key, the top standard of professionalism for the secretary.

## 14. Standards of Preparation for Office Practice Teachers

**R. DERMOTT BELL,** Brigham Young University, Provo, Utah

The term "office practice" means different things to different people. There is almost as much difference between some office practice courses as there is between some subjects. There are few courses in business education which are marked by greater variety, diversity, and extremes. And even if office practice teachers taught only office practice, it is impractical to recommend or require a single course of professional preparation for them, since their duties, teaching methods, and the particular subject matter taught may differ greatly from one school to another.

"Office practice," as it is used here, is a relatively general term. It refers to an advanced vocational course very near the end of a student's program of studies in business education. Beyond that, however, it may be regarded as having wide latitude with respect to specific subject matter, methods of teaching, student qualifications and competencies, and organization of class and extraclass activities. In short, whether the course emphasizes the refinement and integration of all or most of the secretarial skills, whether it tends to concentrate on filing, general clerical procedures, and specialized uses of the typewriter, or whether it provides an opportunity for actual on-the-job experience or an office apprenticeship, it is still regarded for purposes of this discussion as a course in office practice. It may carry officially the office practice label, or it may carry some other title such as secretarial procedures, office techniques, or clerical training.

Teachers of office practice seldom teach only office practice. Usually, not more than one or two courses are included in a teacher's schedule. Courses in typewriting, shorthand, bookkeeping, basic business, and other business education offerings are typically included in the office practice teacher's assignment. Therefore, the professional preparation of the office practice teacher must necessarily parallel in many ways the preparation of other business teachers. Nevertheless, because of the unique characteristics of many office practice courses, a teacher in this area who has had experience and instruction designed especially for the office practice classroom will enjoy a distinct advantage over one who has not.

Obviously, a prospective business teacher can rarely anticipate whether his first teaching assignment following graduation will include classes in office practice. If he is wise, however, he will assume that it will. The course is not only a common one at both the secondary school and college level, but its value to the student has long since been established. A school with a business education program that does not include an office practice course will therefore be an exception rather than a rule. And generally speaking, the smaller the program—that is, the fewer business teachers there are—the greater the probability the teacher(s) will teach office practice. A student planning to be a business teacher will thus do well to include in his academic preparation those courses that will do the most to assure his effectiveness in the office practice classroom.

## Course Content

What precisely, then, does one study to prepare himself to teach the office practice course? Again, if we could talk about a particular course in a particular school, it would be a simple matter to answer that question. But since few students in college know exactly where or what they will teach following graduation, the answer must be expressed in terms that have at least somewhat general application.

*Secretarial Skills.* A good place to start, though certainly not the only one, is with the secretarial skills of shorthand, typewriting, and transcription. Since office practice frequently emphasizes, polishes, and integrates these common office functions, it follows that an office practice teacher should be well informed and reasonably competent in them himself. It is true that some teachers have taught these skills—even in office practice—without having themselves previously studied them. It can and has been done. The quality of instruction, however, as well as the value of the learning experience has generally been inferior to that which occurs where the teacher is well trained in the subjects taught and enjoys the advantage of perception and understanding that comes through the actual acquisition and use of the skills themselves. The do-as-I-do, or in this case, do-as-I-did approach almost always has proved more successful than the do-as-I-say technique.

*Office Machines.* Another area of vital importance to the office practice course is that of office machines. Duplicating machines, transcribing equipment, computing machines, typewriters, and a host of other machines and equipment used in office operations are included. It would be an unusual office indeed that did not include all or some of these items in its activities. There may be neither time nor facilities to teach students to master them, but there still should be reasonable exposure and instruction on as many machines as circumstances permit. Here again, the teacher should have acquired enough information and experience to teach the machines with confidence and skill. "Just following the manual" may be a convenient approach for the instructor, but it certainly is not an effective one—despite the rationalization of those who use it. If the teacher did not receive adequate training in the machines area, he should expend the time and effort later on to become proficient in the use of these machines, even if he must do it on his own following graduation. This is particularly true of those pieces of equipment in the teacher's own classroom. And proficiency means thoroughly skilled, not just casually acquainted.

*Filing.* A facet of office practice of which the teacher's understanding and instructional competence should be unequivocal is that of filing, or perhaps we should add *finding*. Rare is the office worker who sooner or later is not involved in this process. Its importance to smooth and efficient office operations is a story that is known intimately, and sometimes painfully, to all business teachers. It is therefore apparent that a business teacher's professional preparation should include an intensive analysis and a thorough mastery of various filing systems and principles. A teacher should be aware of the strengths and weaknesses of each system. But information, though it be extensive, is not enough. The well-informed teacher who still cannot teach is no more effective than the teacher who is not informed at all. Filing is not taught easily. Perhaps that is why it often is not taught well. The twin prerequisites for competent filing instruction are knowledge and methods. And the teacher who lacks either of them will have trouble in the classroom, while his students will have trouble in the office.

*Other Clerical Duties.* Much could be said about the need for preparation to teach such other common office practice topics as transportation, communications (including telephone technique and mail services), personal grooming, job applications and interviews, and a wide variety of other clerical duties. Which of these are included in the course will again depend on the school, the students, and the teacher. Certain topics, however, are probably basic to nearly all office practice courses, regardless of where they are taught and who teaches them. Other topics may or may not be included, depending on the circumstances. Those that are common to most office practice courses certainly should receive attention in the education of business teachers. There should be plenty of information available to identify those topics that are most commonly taught. In the case of those topics that are taught less frequently, it may be impossible or impractical to give them more than a passing glance in the teacher's preparation. Nevertheless, the new teacher should at least know of their existence and what to do on an individual basis to equip himself adequately to provide competent instruction in any of these areas that he may be required to teach.

### Office Experience for Teachers

One of the most crucial ingredients in the preparation of office practice teachers is actual office experience. An office practice teacher who has been a secretary, a receptionist, a stenographer, a file clerk, a bookkeeper, a typist, or who has occupied some other clerical position in an office will usually have a distinct edge when it comes to bringing realism, practicality, and life to the classroom. His effectiveness is probably increased even more if he has performed a number of different office functions during his employment. The length of time in the office that should be required of a prospective teacher will depend on the individual and the circumstances, but 1000 hours is probably a reasonable standard.

It should be said quickly that there are no doubt many good office practice teachers who have never worked in an office at all, just as there are also weak teachers who have logged a great deal of office experience. Obviously, we are not speaking here of exceptions—and these teachers are exceptions. In general, however, the teacher in the office practice classroom who has himself worked in an office enjoys the same advantage as the football coach who once played football, the judge who earlier practiced as an attorney, or the sales manager who has had experience as a salesman.

The prospective teacher can get office experience in a variety of ways. He can work full time or during the summers, either before or after graduation. His professional preparation may provide for an actual office assignment especially designed to give him the experience he needs. Or he can take advantage of a supervised graduate internship of some type, which may bring him both academic credit and income while giving him valuable and current office experiences. Whichever method is selected, there is little doubt about the value of firsthand office experience to the teacher who intends to relate the real life situations and demands of the office to the office practice classroom.

### Work Experience Programs

The office practice teacher who administers a work experience program will almost certainly appreciate having been prepared for that assignment. It is no small task to develop, organize, and supervise such a program. The teacher who is forced to undertake this task without previous training and experience will do as much learning as he does teaching. Surveying the community to locate suitable positions in which students may be placed, developing with the cooperating firms acceptable sequences of useful and constructive experiences for students, matching students with positions and employers, working out satisfactory and constructive programs of supervision, evaluation, and public relations all require imagination, ambition, perception, and generous quantities of tact and diplomacy. How fortunate is the teacher who has had preliminary training to anticipate and deal with these and other related problems.

### Teacher Education Schools

One final point of significance has to do with colleges and universities that prepare business teachers—office practice instructors being among them. It is often easier to suggest what should be included in the preparation of a teacher than it is for the prospective teacher to get that preparation. It sometimes makes very little difference what the student wants or believes he should study, even at the graduate level. The fact of the matter is that if he wants to study at all, he must study whatever is available to him, regardless of its pertinence and value. Only to the extent that the program of study provided by the college is a realistic one, is the academic preparation of the teacher adequate to the demands made on him. Teacher education schools, therefore, should never let their curriculums become static or inflexible. The prospective office practice teacher may lack the understanding and the experience to know what subjects can be studied most profitably while preparing for his profession. The college or university has no such excuse—it is the school's unavoidable responsibility to know precisely what should be taught in terms of a student's professional and personal objectives.

In summary, the office practice teacher is probably expected to be better informed about more things than any teacher in the school. The range of topics in the office practice classroom is wide and varied, and often unpredictable. What constitutes adequate preparation for the teacher, therefore, is not easily determined. There are areas of major importance in this course, however, that can be identified and which should be given special emphasis by the prospective teacher and the college or university. Secretarial and stenographic skills, office machines, filing, related clerical studies, administration and supervision of work-experience programs, and at least some background of personal office experience are among the most obvious. There are other topics of importance, of course. And some of those named may never present a challenge or even exist for some teachers. All of which only emphasizes the degree of flexibility which marks this course and the variety of demands which are made of the instructor. But the teacher who comes out of college well prepared to teach the common essentials of office practice, and then remains sensitive to local trends and demands that are likely to affect the employment prospects of his students, may very well find office practice to be not only one of the most stimulating and satisfying classes in the entire curriculum, but also one of the most valuable and appreciated courses his students will ever take.

# 4

# Improving Personality

## 1. Standards of Personal Conduct for the Office Worker

**RUTH B. CARTER,** Central High School, Little Rock, Arkansas

Should a person's conduct in the office be different from his conduct in any other public situation or setting? It seems that the term "conduct," when analyzed, means the same as a good old-fashioned attitude.

Perhaps "attitude" is overworked as far as talking about it is concerned, but apparently the application of good attitude, good behavior, or good conduct is not overworked by beginning office workers—and in too many instances by the "old-timers." It is alarming to note that so many jobs are lost almost daily as a result of undesirable behavior. Everyone should remember the *ABC's* of conduct when dealing with other persons in an office situation or in any business transaction.

### A—Attitudes

If a person has average ability, he can be a success if he has the proper attitude. This could encompass everything from his training in high school, business school, or college to obtaining a job.

Business and office occupation courses are elective courses in most high schools, which should indicate that the students who enroll in these classes have a desire to prepare for a career in business. Regardless of their vocational preference, however, the knowledge acquired in these courses has many applications to their everyday personal lives. Proper attitudes are stressed in these courses because business teachers are aware of the fact that too many people fail on the job as a result of improper attitudes.

Lack of respect for office hours and fellow workers; gum chewing on the job; poor work habits, such as failure to keep the working area in a neat, systematic manner; poor grooming, such as being overdressed or dressed too casually, too much makeup, extreme hair styles, and the like reflect a person's attitude.

One employer recently gave the following reasons for discharging a girl who had been with the company a few months: She had so little regard for office hours that instead of taking the coffee breaks in the company lounge where coffee and snacks were provided, she went next door to a public restaurant. She always stayed out of the office from 15 to 30 minutes, and when she returned, she did not resume work again until she went to the powder room to re-do her makeup.

Every time a man entered the office, this girl stopped working and her eyes followed the man wherever he went while he was in the office. Her mind was seldom on the job as she had to be told the same thing repeatedly. After having been given reasons for being discharged, the young woman reminded the office manager that he had told her to ask questions about anything she did not understand. He replied that she should have asked questions, but not the same questions day after day.

Perhaps this is an isolated case, but it never should have happened if the job preparation this girl had in school had been considered. Further study, in all probability, would not improve her basic attitude.

### B—Basics

In addition to a sound academic background, certain basic requirements must be met. The company is judged by the employees who represent it. If a person is not happy with the firm, he should seek employment elsewhere—at least one-third of his day would be unhappy or even miserable.

*Pleasantness* means so much and takes so little effort. Everyone enjoys a nice smile, and it is much easier to gain another person's confidence if he is greeted warmly. Personal annoyances and problems should be forgotten before one gets to the office.

*Dependability* cannot be overlooked. This includes regular attendance as well as getting the job done on time and in the proper form. There are times in everyone's life when he has a headache or some other minor ailment in the mornings, but if staying at home to nurse these temporary ills becomes a habit, then the company probably can do without him permanently. Even if a person is chronically ill, perhaps his employer will feel sorry for him; but since business does not operate on sympathy, the company cannot afford to retain him as an employee.

*Loyalty* is a necessary characteristic for everyone. No one enjoys hearing a person criticize the company or the superiors for whom he works. Loyalty and respect go hand in hand. It is difficult to do a topnotch job for someone for whom one has little or no respect.

*Enthusiasm* makes for good relations both inside and outside the office. This can be contagious, but it is an epidemic that should be spread. Those who advance most rapidly are the ones who show enthusiasm not only for their own particular jobs but for all the activities of the company.

When a company auditor asked some clerks in an accounting office why they did a particular thing, they replied without hesitation, "Because Mr. Williams told us to." They had no conception of how their work affected the total operation. An enthusiastic person would know why he does each task and how it fits into the complete picture.

*Tolerance* and a *genuine concern* for others should not have to be mentioned, but it is amazing how many people disregard them completely. No one is perfect. A large percentage of society today is handicapped in some way–physically, mentally, or socially. Everyone has not had the same background or the same advantages. Only a snob would make fun of or criticize another for any or all of these weaknesses.

Being *cooperative* adds much to the smooth operation of any office. There are rush periods and slack periods in most offices. If everyone cooperates by helping fellow workers during the peak-load periods, then everyone gets through on time instead of having to stay after hours to finish. If and when it becomes necessary to stay late to get the work finished, then this should be done willingly and pleasantly. Helping others in the office should be with the approval of superiors, however.

Personal conversations should be reserved for coffee breaks, lunch hours, or after hours. A businessman remarked recently that he wished all his employees were deaf mutes who had no family or friends, because the office buzzed constantly with talk about family, friends, and chitchat in general. This is a drastic remark, but few companies can afford to pay employees to gossip when they should be working. Another businessman who heard this comment mentioned that he had the same problem in his company, but it was solved by moving the desks farther apart. It is tragic that companies must resort to such expensive measures to get employees to work during office hours.

*Conscientiousness* is a major factor in proper conduct or behavior in the office. A conscientious person usually possesses the other qualities so vital to success. The conscientious person has little or no time left for unacceptable behavior.

*Humility* is perhaps the most important single characteristic a person can display in an office and elsewhere. No one enjoys a braggart. People should be humble for the opportunities and advantages they have. A speaker once pointed out that in the word, "humility," *U* comes before *I*. How many times have letters been rewritten to avoid starting a paragraph with "*I*"?

## C—Common Sense

Someone once said, "Knowledge without common sense is folly; knowledge with common sense is wisdom." This is especially true in an office where many types of work must be done, many persons must be dealt with, and many decisions must be made. It is in the daily discharge of the variety of duties performed that common sense pays off.

Common sense is extremely important in personal habits such as getting enough sleep at night so that fatigue will not prevent alertness the next day. Personal cleanliness cannot be overlooked. A deodorant should be used and perfume should be avoided or used sparingly. Perfumes are offensive to some persons.

A person should dress carefully each morning and use good judgment in selecting appropriate clothing. Makeup should be applied carefully and then forgotten. Hair should be arranged neatly before work and forgotten. It shows lack of common sense to apply makeup or to comb one's hair in public.

It is necessary for men and women to work closely in an office. Many young persons, unfamiliar with office routine, get the idea from motion pictures and television shows that this association is all romance. Nothing could be further from the truth. For this reason, extreme caution should be exerted so that wrong impressions will not be formed. Gratitude and respect for work well done should not be confused with romance.

Local customs and office customs should be observed. More and more, persons leave their home town or state for employment. Nothing becomes boring so rapidly as hearing a newcomer constantly remark, "Back home we did it this way." Unless an effort is made to learn company policies and procedures, the other office workers may feel like telling him to go back home if that is what he prefers. After a new employee becomes established, however, his opinions probably will be respected and sought.

Coffee breaks are provided by many companies. These breaks should not be abused. Few persons experience a starved feeling between regular meals that are adequate and well balanced. Food should not be kept in the desk or consumed at the desk. Chewing gum prevents one from speaking distinctly, as well as giving one a sloven appearance. Smoking should be reserved for the break period—many persons are allergic to smoke; others may object to the use of tobacco.

Telling jokes, involvement in personnel conflicts, or spreading gossip should not take place in an office. A number of excellent reference books on this subject are available. Business teachers, students, and office workers should read these books often. The Administrative Management Society published an excellent brochure for student use. A copy of this brochure, "A Letter to Patty—How To Secure and Hold a Secretarial Position in the Business World of Today," can be obtained from local chapters of AMS.

The ABC's of conduct are in reality among the first things a person learns—The Golden Rule: Do unto others as you would have others do unto you!

## 2. Our Students Need More Responsibility

**DONALD J. D. MULKERNE,** State University of New York at Albany,
Albany, New York

Have we lost sight of the most important objective in the school—character education? Included in this vast and complex problem of providing better character education for our youth is the problem of teaching responsibility. A publication of the National Education Association, "How Good Are Your Schools?" stresses the need for developing more responsible citizens. The section on responsibility states that this trait must be taught and not left to chance, and that all students in all occupational choices should develop a sense of responsibility before graduation. There is no doubt that more attention must be given to character education.

Having proper attitudes about a job demands that the worker exercise a basic responsibility—to do the best job he is capable of doing every minute he is on the job. Business does not want the "gliders." You know who the gliders are in your class, don't you? Unfortunately, there is an alarming number of students who are coasting through school and who have not accepted the responsibility of developing their potential so as to take their place as worthy citizens and workers. You and I need to be more concerned about knowing who the gliders are. Once they are identified, steps can be taken to prod them out of their lethargy so that they can approach their first job with the understanding that in return for their pay check, they owe the employer their full time and best effort at all times.

The Charters and Whitley study lists desirable secretarial traits and assigned the rank of "2" to responsibleness.[1] Through the years, many studies discuss the importance of character traits in business and point up the need for greater responsibility being shown on the part of workers.

The booklet, "So You Want a Better Job," by Paul W. Boynton includes a percentage table prepared by the principal of Meriden (Connecticut) High School in which the reasons why workers failed on the job or failed to get promoted are given. He found that 10.1 percent of the discharges were due to skill deficiencies while in 89.9 percent of the cases, workers were fired because of one or more character trait deficiencies, including weaknesses in responsibility.[2]

### More Emphasis on Attitudes

Why are so many young office workers lacking in desirable character traits? An answer to this question is that schools have been too busy teaching skills to the neglect of developing healthy attitudes about business responsibilities of workers. The wise businessman is more interested in hiring a person who knows how to exercise good judgment, who understands his responsibilities as a member of a working team, and who gives evidence that he has the ability to mature into a valuable worker in the firm. And yet, so many business teachers are struggling to get their students to attain "business standards" (whatever *that* means) and these same teachers are trying to turn out secretaries, accountants, and office managers. In so doing, these teachers completely "miss the boat" on what businessmen are really looking for in their workers.

### Changing Standards

Business standards change during periods of partial and full employment. When workers are scarce, such as in a war period, businessmen are willing to lower their standards rather than go without help. While the labor market is critical, inefficient workers remain on the job. Today we no longer have such a critical labor situation. We are graduating more youngsters from our business programs than ever before. Competition for jobs grows keener every month. Businessmen now favor the job applicant who has:

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[1] Charters, W. W., and Whitley, I. B. *Analysis of Secretarial Duties and Traits.* Baltimore: Williams and Wilkins, 1924. p. 175.

[2] Paul W. Boynton. *So You Want A Better Job.* New York: Socony Mobil Oil Company, Inc. 1955. p. 4.

1. An employable basic skill such as typewriting, machine transcription, and office machines
2. A general orientation to business through courses with the right content and presentation as may be found in introduction to business, bookkeeping, and secretarial practice
3. An understanding of the American economy through courses with the right kind of content and presentation as may be found in economic geography and other courses
4. A mastery of the 3 R's—reading, ritin', and 'rithmetic
5. A sound development in character.

Unfortunately, schools have not been as alert in their character education objectives as they should be. As a result, our business education students leave our schools with dangerous "I don't care" attitudes about school and its objectives. They display this attitude while in school every time they say to you:

"Is this all right?" (when handing in an assignment)

"I didn't hear you say you wanted it double spaced."

Here, then, is a perfect example of excuses, admissions of lack of effort, broken promises, and good intentions. How tragic it is when we let our students get away with it. By going along with them, we give approval to their actions. How far would these same students get with a business employer by voicing the above questions? Every time we accept substandard work from our students, we are doing them a grave injustice because we are encouraging them to be irresponsible.

### Specific Suggestions

Here are some suggestions for helping students to develop greater responsibility:

1. Teachers should require students to assume the responsibility of their own work quality. To consider 65 percent to be a passing grade is completely unrealistic. If the work submitted does not reflect the student's *best* effort, it should be returned to him to be done again. Businessmen insist that all work submitted be correct, so why shouldn't business teachers expect this same perfection?

2. Teachers should expect the best performance from students at all times, including the period just before and after vacations. And yet, many teachers believe that little can be accomplished during this time. How

many times have your students pleaded that they could not get their homework done because of the "big game," dance, or other social function competing with their school responsibility? Business does not put up with such excuses, so why shouldn't business teachers follow the same pattern?

3. Teachers should expect 100 percent attentiveness from students at all times. This will eliminate time wasted in repeating instructions and assignments. With this new attitude, students will no longer be able to say, "I didn't hear you say that we had to do this for our homework." Businessmen do not tolerate inattentive workers so why shouldn't business teachers insist upon attentive students?

4. Teachers should expect their students to exercise good judgment in everything they do. Real thinking takes effort and it is so much easier for the teacher to do the thinking for the class. When teachers carry this burden they violate the concept of responsibility. Businessmen expect common sense judgments from their workers, so why shouldn't business teachers expect good judgments from their students?

5. Teachers should insist that all work be submitted when it is due. A contract exists between the teacher and the class when work is assigned. When work is not submitted on time, the contractual agreement of the students who are delinquent in their work is not fulfilled. Businessmen expect that date lines for work projects will be met so why shouldn't business teachers expect the same promptness from their students?

6. Teachers should insist on complete compliance with instructions. There are many ways of doing a piece of work. Although students should not have every procedure spelled out in detail, there is still a framework of procedures within which they should operate. When deviations from work patterns and routines occur, particularly when teamwork is involved, efficiency and production drop. Businessmen insist that their workers follow company procedures (with ideas for better ways of doing things placed in a suggestion box) so why shouldn't business teachers expect the same consideration and cooperation from their students?

7. Teachers should insist that students proofread all work before it is submitted. Too much time is spent by teachers doing detective work when they should be teaching and circulating around the room ready to render aid when needed. Students will allow their teacher to locate errors so long as teachers are willing to perform this chore. Businessmen neither have the time to check papers nor do they think it necessary to do so, so why shouldn't business teachers expect that papers handed to them by students be free of errors?

8. Teachers should insist that students develop a cost consciousness about equipment, supplies, and time. An unnecessary expense is incurred in a firm through abuse of equipment, wasteful use of supplies, and by workers who have to delay jobs until they restock on paper, carbons, and other supplies. Expensive office equipment should be given the same care as a birthday watch. Paper represents pennies, and like money, should be used wisely and appropriately. Businessmen expect their workers to hold down office expenses, so why shouldn't business teachers expect the same economical considerations from their students?

9. Teachers must insist that students come to class ready to work. Students should do more than "put in their time" or "go through the motions of working." People are paid to produce. Businessmen expect employees to report for work, leaving their troubles and fatigue at home, so why shouldn't business teachers expect this same type of "readiness" from their students?

Teachers should be alert to deficiencies in work attitudes and then take the necessary steps to correct those deficiencies. Developing responsibility should be in the preferred group of teachers' objectives. Integration of effort rather than lip service is needed if a sense of responsibility is to be developed within students. The entire program of the school needs to gear itself toward this objective. Open lines of communication between teachers concerning what each is doing to develop this trait must be set up.

The teaching of responsibility begins with the first day of class and continues with all students, in all classes, through graduation. If students are to develop responsibility, they must first see the need for it. Once they gain this understanding, there is a much better chance that they will become the kind of workers business needs today.

## 3. Inspiring Desirable Personal Development in Students of Typewriting

**IROL WHITMORE BALSLEY,** Texas Technological College, Lubbock

The teacher of typewriting has an enviable opportunity to help students develop desirable attitudes, character traits, and work habits that will serve them well in adult life. In a well-taught typewriting class, the student not only acquires skill in the use of a basic communication tool, but also strengthens his ability to work independently, to apply knowledges and skills in the solution of problems, to function effectively in a situation in which he must rely on himself for the completion of a job and yet in which he must be considerate of the rights of others. He must work in harmony with those with whom he shares equipment and supplies. This unique opportunity for growth in the area of attitudes, traits, and habits of work can be exploited by the teacher through skillfully planned classroom procedures, through efficient organization of course content, through his activities during the class sessions, through his personal example in attitude and behavior, and through setting high standards toward which his students will strive.

A positive attitude on the part of the teacher is a prime requisite to the utilization of the opportunities afforded—an attitude of expectation of proper behavior rather than one of improper behavior, an attitude of confidence that the students are as eager to progress as he is to have them progress. Such an attitude can be the teacher's only if he senses the possibilities that exist in the typewriting course for more than technical skill development. A teacher with a heavy teaching load may be sorely tempted to "monitor" a typewriting class rather than to "teach" it, but to do so is to miss an opportunity for the most rewarding type of teaching—that type which brings the students to an awareness and possession of some desirable characteristics of adult behavior even as it brings them to a satisfactory level of skill in typewriting.

### Satisfactorily Completing a Job

The habit of staying with a job until it has been completed satisfactorily can be developed in the typewriting course. To insure the acquisition of this work habit, however, instructional materials must be well planned. Problems to be solved must have been analyzed for difficulty and arranged from simple to complex so that satisfactory completion of each job is within the realm of possibility. For example, in the area of letter writing, the teacher must have analyzed carefully each letter to ascertain the problems contained in it. Letters with the fewest and simplest problems must be assigned first and be followed by letters in which the problems are of gradually increasing difficulty. For example, multiple carbon copies should not be included in the problems to be faced until the students have had the opportunity to acquire some facility in typewriting one and two carbon copies. Assignments should not have items included that complicate attractive placement until students have had experience with "skeleton" letters; that is, such letter "lengtheners" as subject and attention lines, postscripts, and special mailing notations should not be injected into the problem letters until the students have gained experience in typewriting the simplest letters from the point of view of arrangement.

Well-planned classroom procedures should include a carefully worked out time schedule so that satisfactory completion of a job will be within the realm of possibility. The student must have time to evaluate his work to determine its acceptability. In other words, he must have time to proofread his typescript and to correct any mistakes he may find. Proofreading is a difficult skill to acquire, and the student will need assistance from his teacher in developing it. One of the most important activities of the teacher during the class session is inspecting the work of the student to essential work habit, but it also adds zest to the students' typewriting successfully. If he has overlooked an error, the master teacher will help the student find his error by skillful questioning; he does not directly point it out to him, since that would not develop his skill in self-evaluation. The approach of the teacher to the student who has undetected errors is all-important—it must be one of confidence that the student has not yet mastered the technique of proofreading, not that he knowingly submitted a typescript with errors on it. The teacher must be frank to admit that proofreading is not easy but that the skill can be acquired and is well worth the necessary effort. The teacher's role in helping the student acquire the habit of satisfactorily completing a job requires a combination of footwork and headwork as the students practice.

### Working Calmly Under Pressure

Whatever the field of endeavor, pressure of time is a commonly experienced phenomenon. Steadiness in working under pressure can be acquired in the typewriting class by having students typewrite under timing so frequently that they become accustomed to it.

If students have not had sufficient experience in working under pressure in practice situations, they will almost certainly "blow up" in a test or in real-life situations. Not only does working under timing develop an essential work habit, but it also adds zest to the student's typewriting activities. They respond to the stimulation of working under timing; they like to "beat" their old records.

The teacher must exercise care in choosing a basis for measuring output. The basis must take into consideration the difficulty of the job being undertaken. In one instance, the satisfactory completion of one 150-word letter would conceivably justify a word of commendation; in another instance, not less than two 150-word letters would be regarded as excellent performance. A graduated words-a-minute scale for an entire term has only limited usefulness; rarely are the problems for any two periods exactly parallel in difficulty. If records are kept of performances on a particular exercise for several terms, a reliable words-a-minute basis for rating that one problem may be determined. Perhaps one of the most defensible plans for rating output is that of basing an evaluation on the best two or three performances on each type of activity during the term. Under that plan the student has an opportunity even on the last day of the term of improving his record.

### Efficient Organization of Supplies

The habit of organizing supplies for efficient use is one that can be developed in the typewriting class. The teacher has a direct responsibility in the development of this habit. He can lead the students to an appreciation of the "cost" of disorganization by timing them on the performance of certain isolated skills and knowledges that are component parts of the typewriting process. For instance, he can time the students on assembling a carbon pack of one original and five carbon copies with their supplies in various arrangements on or about the desk. He can time them on assembling a carbon pack several different ways operating from the same arrangement of supplies.

The students can be timed on erasing and correcting mistakes with the necessary supplies in various locations on the desk. They can be timed on erasing and correcting mistakes when the mistakes are located while the typescript is still in the machine, and on erasing and correcting mistakes when the errors are discovered after the typescript has been removed from the machine. Timing is infinitely more effective than simply telling the students what arrangement of supplies is most efficient.

### Following Directions Precisely

The habit of following directions precisely is one that is difficult to develop, yet it is one of the most valuable to acquire. Most typewriting jobs involve numerous details, and attention to each of them is a skill requiring considerable practice. This habit ties in closely with the first one discussed—that of satisfactorily completing a job.

The teacher plays a significant role in the students' acquisition of this habit. First, he must be sure to give directions clearly and completely so that there is no need for questions for clarification. Second, he should insist that students make written notes of all directions, even the seemingly simple ones. Third, the teacher must refuse to accept work in which directions have not been followed, even though the job is acceptable in all other respects. The admonition to "watch that next time" will never bring about the habit of following directions precisely. "Avoid mental notes" is a slogan well worth writing on the chalkboard. This habit cannot be developed if students are allowed to ask other students for repetition of directions. If typewriting is done under timing, students will have incentive to listen carefully when directions are given; they will also be hesitant to lower some other student's rate by asking for help.

### The Habit of Neatness

Neatness is a habit of major value. Its presence or absence is easy to detect, of course. Here, again, the teacher plays a vital role in its acquisition. He must show students how to achieve clean copy. First, neatness can be stressed in teaching efficient organization of supplies as discussed earlier.

Second, the teacher must accept only clean typescripts. Since cleanness of copy requires ability to erase and correct errors expertly, the teacher must give proper instruction in erasing and correcting of mistakes. The teaching of good techniques takes time, and the development of proficiency in those techniques takes even more time. Too often erasing is presented in a few minutes of class time and then the development of good habits is left to chance. Students need practice in using various types of erasing supplies, and there should be frank discussion of the advantages and disadvantages of each. Students should have the opportunity for planned practice in erasing and correcting of various types of errors. In those practice exercises, such techniques as protecting surrounding copy, erasing punctuation marks, preventing offset, and correcting errors detected after removal of copy from the machine should be taught.

Techniques of removing smudges from copies or of roller marks from carbon copies should be explained. Keeping the keys clean (discussed in connection with the next habit) is basic to neat copy. A teacher who would develop the habit of neatness cannot afford to accept any work that has been typed with clogged keys.

Teachers who want to develop the habit of neatness should introduce erasing and correcting techniques early in the course—preferably before moving from straight-copy work to problem work—so that a high level of skill can be achieved. The master teacher realizes that to delay instruction in correcting techniques in order to avoid the necessity of reminding the students to move their carriages when erasing is to fail in his obligation to provide top-level instruction. Repeated reminders are a natural part of teaching in developing such a habit.

### Properly Caring for Equipment

Properly caring for equipment is a habit that is of inestimable value, and the typewriting class provides an excellent setting for its development. Classroom procedures can be followed that will provide for the acquisition of good habits in machine care.

The acquisition of this habit necessitates the availability of certain minimum equipment. A type brush and a long-handled brush can be kept in the drawer of each desk. The students can be taught to clean the type when they enter the typewriting class and to clean out the erasure crumbs from the carriage rails and off the table at the close of the period. If there is no drawer in the typewriting table, a supply of each type of brush can be placed in a box at the front of the room or on the teacher's desk; and the students can pick up the brushes upon entering the room and replace them as they leave. This procedure takes only a few minutes and is of sufficient importance to justify the time devoted to it. If equipment is properly cared for, no typescript will be typed with clogged keys; in other words, the habit of caring for the typewriter helps with another habit—that of neatness.

Proper care of equipment includes changing the ribbon whenever necessary for clear, readable copy. Here, again, the teacher plays a key role, for he must provide for ribbons to be changed often enough to enable the students to acquire facility in this skill.

Ribbons should be changed several times during the term by each student in each class. Actually, ribbons can be changed by four different typewriting classes on the same day, if necessary. All that is needed is two ribbons for each machine. If the ribbon being taken off is still usable, it is returned to the teacher or placed in some designated drawer or box. A different ribbon is placed on the machine. If ribbons are changed in the next period, the ribbons removed during the first period are placed back on the machine. Whenever a ribbon is worn out, it is thrown away; and an unused ribbon replaces it in the supply drawer or box.

Ribbon changing should be done at the beginning of a period, not at the end. In that way, a student who puts on a ribbon incorrectly will have an opportunity to discover and correct his error. Also, the machines will be left in working condition so that the activities of the next period will not be disrupted by ribbon trouble. To take care of dirty fingers, the teacher can have damp paper towels available or some commercial handcleaning product; the problems involved in having students go to rest rooms to wash their hands can be avoided.

Promptness in arriving for work is a habit that can be developed in the typewriting classroom. The teacher must be prompt in arriving for the class and in starting class activities if he is to encourage the students to be prompt. An example of promptness is a hundredfold more effective than exhortation without example.

A carefully planned schedule of each hour's activities is essential. If the students know that a certain type of timed activity will take place as soon as classwork officially begins, they will be quick to clean their type bars and to arrange their materials correctly so that they can "warm up" for the timing that is to follow. For example, if students know that the initial activity will be a timing on a carriage-throw drill, they will be eager to practice for it. If the first activity will be a timing on a stroking drill, then that will be the clue for their warm-up activity.

Promptness in attacking production work can be developed if the typewriting is done under timing. Also, promptness in handling homework assignments can be a habit if the teacher refuses to accept late work except for reasons such as illness.

### The Trait of Maturity

The trait of maturity has many facets. In the typewriting classroom, students can be taught to accept criticism in good spirit—one facet of maturity. The teacher has a responsibility to give consructive criticism. Scolding is not good criticism. It assumes that a person has failed because he is not making an effort, because he is stubborn, or because he wants to make trouble. The manner in which the teacher gives criticism plays an important part in the student's developing the proper attitude toward it.

A teacher may find it helpful to spend a few minutes explaining that constructive criticism is a valuable aid to the learner and that it should be welcomed. Criticism may prevent wasted time and effort; it may point to a cause of difficulty that the individual concerned could not see, thus providing a short cut to improved performance. A person can make a stupid mistake without being a stupid person.

The teacher must keep constantly in mind the fact that habits are not formed as a result of one performance but as a result of many performances; therefore, reminders will have to be given several times before a way of doing something becomes a habit.

Frequently the mistake is made of telling a student that a problem is simple when in reality it is not, thus making the student feel that he is unintelligent if he does not perform satisfactorily and not particularly proud if he does perform satisfactorily. Frankly admitting a problem to be difficult but solvable presents a challenge to the student and opens the door to a feeling of real accomplishment when he has mastered the assignment.

The teacher can also take positive steps to curb immature expressions of disappointment. Students may need to be made aware of the fact that to groan audibly, to slam a book down on the desk, to be rough in handling the machine when a mistake has been made is to reveal immaturity. Everyone makes errors; and the mature individual, recognizing that, takes trouble calmly and proceeds to correct his errors quietly and quickly. Self-discipline is a desirable attribute, a sign of maturity of which one can be proud.

### Pride in One's Work

This attitude is probably one of the most valuable a person can possess. It could be said to rest to no small degree on some of the habits previously discussed, such as neatness, following directions precisely, and completing a job satisfactorily. This attitude can be developed in the typewriting course if the course is so conducted that a student has an opportunity to feel genuine pride in his accomplishments. In order to feel pride, he must meet a standard of excellence that justifies pride. No student can be justly proud of a typescript that is smudgy, that contains uncorrected errors, that is unattractive in its arrangement.

The teacher's role in inspiring students to acquire this attitude is a many-sided one. He must set standards that are high enough to enable a student to feel a sense of real accomplishment when he reaches them. He must help the student develop a set of personal standards of excellence, not just meet his, whatever they may be. If a student can be led to take pride in a job well done, he is moving in the direction of realizing that work is satisfying, that it is fun.

A teacher who would have his students be enthusiastic about their work must himself be enthusiastic about his own. A teacher who complains constantly, who scolds incessantly, who approaches each day's work as drudgery can never develop in his students pride in their work or instill in them the idea that work is enjoyable.

### Respect for Others

An attitude of respect for others includes respect for their property, for their abilities, and for their time. Respect for property of others is developed in the typewriting class through, for instance, the habit of properly caring for the machine. Since many different persons use the same equipment, each should respect the rights of another to have a machine left for him in excellent condition. If this respect is held by the student, he will assume his obligation to leave the machine in proper condition: erasure crumbs brushed out of the machine and off the table. He will move the carriage whenever he makes an erasure. He will deposit his own wastepaper in the wastepaper basket, not leave it for someone else to dispose of.

If the student respects the time of others, he will not interrupt them in their work to ask questions to which he can find the answers himself from his notes or from some source such as the dictionary. He will not cause commotions that will distract others from their work.

If he respects the abilities of others, he will give credit where credit is due; he will not speak disparagingly of the performance of others. Thoughtfulness of others comes from having a respect for them and their rights. A respectful person is conscious of his surroundings and of his part in making them pleasant; and he avoids annoying mannerisms that are distracting to others, such as making unnecessary noises, chewing gum, wearing noisy jewelry. A teacher should help the students realize that such mannerisms and activities are discourteous to their fellow classmates as well as to him.

Consideration of others is demonstrated in the typewriting class by quietness when directions are being given, by picking up possessions when they fall to the floor, by not shaking a stubborn pen so that ink falls on the floor or desk, by not writing on or defacing in any way the furniture, by not borrowing from others. These evidences of respect for others must be discussed with students; they are not facts self-evident to students.

The typewriting teacher has, then, the exciting challenge before him of teaching students to work independently and at the same time to work harmoniously with others in a situation in which there is sharing of equipment, supplies, and the professional assistance of a teacher. To meet this challenge, the teacher will attempt to do the following:

1. Exhibit the habits, attitudes, and traits he wants the students to acquire
2. Have well-planned classroom procedures
3. Have instructional materials well organized
4. Give criticism expertly
5. Challenge students to utilize their abilities to the fullest
6. Work with the students at their desks during the class period
7. Set high standards for his students.

The teaching of typewriting is never dull to those who see in it the opportunity of inspiring students to acquire desirable work habits, character traits, and attitudes while simultaneously developing facility in using a basic communication tool.

# 5

# Effective Guidance

## 1. A Career in the Secretarial Occupations

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Both young men and young women may wish to investigate secretarial occupations as possibilities for careers or as steps toward managerial positions in business. It is an area of employment that more men might well consider; but because over 95 percent of the stenographers and secretaries in the country are women, this report will present facts relating primarily to them. The opportunities for men in the field will be discussed later.

Stenographers are primarily responsible for taking dictation and transcribing letters, memoranda, or reports. In large firms they frequently work in "pools," or centralized groups where dictation loads can be equated and standards of transcription can be maintained. However, in small businesses they may be called upon to answer telephones, serve as receptionists, or operate duplicators, calculators, and similar office machines.

The duties of the secretary differ from those of the stenographer in the following respects: In addition to taking dictation and transcribing, the secretary may be asked to compose the routine letters of the office without the help of the employer and to assist in other writing projects, such as taking notes for articles and speeches, preparing rough drafts for bulletins and brochures, and writing or editing house organs. She is also given more responsibility in connection with meeting office callers and screening telephone calls. In some instances the secretary is requested to handle personal financial records or compile statistical data for reports. She is usually responsible for the executive's files (and perhaps for all the files if the business is small), for scheduling work, time, and appointments, and for maintaining attractive surroundings.

The classification of "executive secretary" was at one time reserved for the chief administrator of the business affairs of an organization or society. Now the term is more often assigned to a top executive's secretary who has responsibilities resembling those of an assistant. The designation of "private secretary" is usually reserved for the secretary of a professional man or woman or a person whose affairs are not connected with a company or firm.

The relationship between employer and secretary should be one of mutual trust and respect (secretary is derived from the Latin word meaning "one entrusted with secrets"); therefore one who is considering a career in the secretarial field should analyze personality traits to be sure she can be loyal and discreet.

Employment in a secretarial occupation has many advantages and some disadvantages. These will be discussed under "Opportunities," but several are pertinent here. Working conditions for secretaries are usually good. The modern office is well lighted, comfortable, and pleasant. The confidential nature of the work performed makes the individual feel a part of the organization and a member of the team. Secretaries have one of the highest prestige positions for women in business, and they exercise more responsibility and initiative than permitted in many other office jobs. The associations with management personnel and with interesting visitors are often a source of personal growth for the secretary. The working relationship between employer and secretary is one which is satisfying to many women who do not seek prominence for themselves but who enjoy helping someone else succeed at his job. The secretary's unique contribution is her ability to understand her employer's business, his way of thinking and acting, and his personality.

### Opportunities

Employment in the secretarial occupations continues to increase, and there is evidence that demand will continue to exceed supply in the foreseeable future. Turnover rates for young women are always high, and expansion in governmental and private business activities is forecast. A report of the Women's Bureau of the Department of Labor emphasizes that stenographers and secretaries will probably continue to have a wider choice of jobs than will persons with only typewriting skills.

No one can predict for sure what the long-term demand for workers in business will be because of the recent and widespread introduction of automation in the office; but anyone thinking of a career should examine trends and secure the judgments of people who are most concerned with adopting and adapting automation to their work. There is not space to digest here the dozens of books and articles being written about the effect of automation on office employment. Perhaps it can be best summarized by "We don't know." Many persons are emphasizing that routine jobs—sorting, typewriting multiple copies, filing, posting, recording, and checking—will be greatly curtailed or eliminated. Many think that transcribers in centralized pools will continue to be needed, but that their opportunities for promotions to secretarial work will be more limited; that the routine jobs of the secretary will be done by machines, but otherwise the secretarial jobs will not be affected.

Salaries vary in different sections of the country and from business to business. A number of surveys have been made which show that salaries have been increasing at the rate of 4 to 5 percent a year.

For those desiring top pay and greater responsibilities, it may be necessary to seek promotion to managerial positions. For instance, in a bank or finance company a secretary who becomes acquainted with the organization may be made the manager of a department; or in television a secretary might gain experience in researching, writing, and organizing some phase of program production.

Opportunities for stenographic and secretarial employment are extensive. No matter where one may want to go or be required to go by reason of family responsibilities, there are usually jobs available. This is not the case in some lines of work open to women in which opportunities can be found only in large cities or in certain locales.

Another factor which is probably considered by most young women is what happens to career jobs when they are interrupted by the period of rearing a family. In some fields, a career is greatly retarded by an extended absence from the profession.

Employment opportunities for men trained in the secretarial skills are expected to be excellent for the next several years. Employers in finance, insurance, real estate companies, and transportation industries often prefer male secretaries. The majority of court stenographers are men. Because the number of men preparing for secretarial work is small, the opportunities for employment are correspondingly good. The promotional opportunities for male secretaries to managerial positions are substantially better than for women.

### Preparation

Persons preparing for careers in the secretarial occupations will usually secure their specialized training in high schools, vocational schools, two- or four-year colleges and universities, or in a combination of these.

Stenographic instruction in the larger comprehensive high schools is often sufficient to equip a person for initial employment. A high school graduate who immediately accepts full-time employment should plan to supplement his education through on-the-job training, attendance at evening school, or some other program of self-improvement. Persons whose formal education ends with high school are likely to limit their opportunities for advancement.

High school is an excellent place to learn shorthand and transcription. Skills learned here can be developed further and refined at the post-high school level. The skills may be used to secure part-time employment to help finance additional training. Part-time employment permits a person to gain valuable office experience and to test the strength of his interest in a secretarial career. This experience is also helpful in developing self-confidence, poise, and other desirable personal traits.

With automation forcing the upgrading of secretarial positions, a college education is becoming increasingly important for persons considering this area of employment. Business executives of the future are likely to be much better educated—probably college graduates; their secretaries will also need to be better educated.

High-level secretarial jobs in terms of salaries and responsibilities—private secretary, executive secretary, foreign service secretary—are most often filled by persons of superior general ability whose educational preparation has provided them with a broad general education, knowledge of business administration and economics, and specialization in the secretarial skills.

Many better-paying secretarial jobs require competency in special terminology; for example, medicine, law, engineering. This competency may be secured in business schools or advanced secretarial courses in college. Often it is acquired on the job with the help of technical dictionaries. In the past when secretarial vacancies arose, they were usually filled with persons whose experience had prepared them for the positions; evidence indicates such vacancies are filled today with persons who are equipped by experience and education to handle the new responsibilities.

### Qualifications

High school and college students who have accumulated an average or better scholastic record in all their school work during the preceding five or six years and who have attained average or better grades in English composition should have no hesitancy in undertaking to learn shorthand.

Placement in a secretarial position is dependent on several factors: (a) educational preparation, (b) specialized training, and (c) personal and social competencies. How well a person measures up to each or all of these factors will affect, to a great extent, her employability and her opportunities for advancement.

1. *Educational Preparation.* As indicated in the preceding section, high school graduation is the minimum education acceptable for a secretarial position; post-high school instruction, perhaps in a business school, vocational school, junior college, or four-year college, is desirable; and graduation from a four-year college or university with a degree in secretarial administration or business administration is strongly recommended.

2. *Specialized Preparation.* Skill in taking dictation and transcribing is required of most persons in secretarial positions. The following table shows some average working speeds acceptable to many employers:

| *Occupation* | *Words a Minute* | | |
|---|---|---|---|
| | *Dictation* | *Transcription* | *Typewriting* |
| Beginning stenographer | 80-100 | 25-35 | 40-50 |
| Beginning secretary | 100-140 | 35-40 | 50-60 |
| Court stenographer | 150 and above | 50-60 | 70-80 |

United States Department of Labor, 1957

Although a shorthand writing speed of from 80 to 100 words a minute may be adequate to handle a majority of the dictation, a definite relationship seems to exist between shorthand speed and the ability to compete for jobs. There is considerable evidence to indicate that the more speed shorthand writers have, the more secretarial positions are open to them. In addition to the preceding skills, a person entering a secretarial occupation should have the ability to spell, punctuate, use good grammar, compose letters, operate transcribing equipment and other office machines, set up and maintain a filing system, handle all common office procedures, and perhaps keep a set of books.

3. *Personal and Social Competencies.* Promptness, neatness, a pleasant and friendly manner, and an attractive personal appearance are desirable for all office workers. For responsible secretarial positions, discretion, good judgment, loyalty, initiative, and ability to make decisions are important. For a person whose position requires that she meet the public —either by telephone or in person—a pleasant, well-modulated voice is important.

For additional information about the secretarial occupations: (a) Arrange a conference with a person in charge of secretarial training at a nearby vocational school, college, or university; (b) Discuss a secretarial career with a high school or college teacher of the secretarial subjects; (c) Speak with a representative from the National Secretaries Association or from the National Association of Educational Secretaries; and (d) Visit with a representative from business.

## 2. Let's Educate Counselors and Parents

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In an era when more forces and pressures are at work than ever before in the history of education, educators should be reminded that the primary objective of public education in America is to serve all youth. Only through effective teamwork among teachers, counselors, administrators, and parents can we hope to carry out effectively the purposes of our educational system.

Teamwork in business education can be accomplished only when members of the team fully understand the total program and the needs of youth which are being fulfilled through that program. The basic problem is one of positive communication. It is the responsibility of every business teacher to maintain an open line of communication with counselors, administrators, and parents. At the present time business education finds itself in what might be adequately termed a "seller's market." After a cycle of emphasis on such areas as science, mathematics, and other academic backgrounds, it is becoming apparent that a great need also exists for vocational and technical areas, including business education. We as business teachers have long recognized the need for business courses as part of each student's education. The responsibility for creating, through communication, the image necessary for others to see that need rests with us.

The guidance counselor has the responsibility for the total guidance program in a school and has many avenues of career preparation to consider in counseling youngsters. Only when a mutual understanding exists between the guidance counselor and the business department can effective counseling be accomplished. First, we need to be certain that we have made available to the guidance counselor up-to-date written information on the business curriculum. A recent request to each of the fifty states for business curriculum courses of study revealed a lack of such current material at the state level. While curriculum guides are available in the larger school systems, it would be a good guess that recent information relative to business offerings needs to be brought to the attention of a large percentage of guidance counselors.

Have you provided the guidance counselor with written materials from your own business department—course outlines for all business courses, student needs to be fulfilled through the courses, and minimum student ability needed for success in the course? Business educators in Illinois prepared a pamphlet, "A Public Understanding of Business Education in the Secondary School," which includes viewpoints about business education, the program in business education, courses in business education, and the learning process in business education. A similar publication adapted to local situations would be helpful to administrators, guidance counselors, and parents.

Also, "The Counselor and Business Education," released by the Policies Commission for Business and Economic Education, deals with problems of counseling students who are college bound, who expect to attend a post-high school, or who expect to enter the labor market upon completing or dropping out of school. Have you checked with your guidance counselor to be sure that this brochure is currently available for reference? With the many pressures which confront guidance counselors, time does not always seem to permit careful study of printed material. The teacher can assist the counselor by calling to his attention items pertaining to business education.

A contribution to the mutual understanding between the guidance counselor and the business department may be made through personal contact. Our professional responsibility may be carried out with much greater ease when we have a close personal working relationship with the counselor. Make an appointment with him. Invite him to visit your department, to see the equipment, and to observe the activities in which business students are participating. While we as business teachers must accept our responsibility for the below-average (which, after all, is an ever-increasing segment of our society that must have basic consumer and business knowledge), we do have a responsibility for the average and the above-average if economic progress is to continue. It is imperative that guidance and business education have a mutual understanding relative to values, objectives, placement, and the like.

At a recent conference one business teacher reported that eight years ago his department in a predominantly college preparatory school had been composed of low-ability students only. This business teacher took a gamble and invited administrators and guidance personnel to join her for an informal discussion on some problems. Several "rough and tough" meetings followed the initial visit; but each became aware of the problems of the other, and as a result came to some understanding. An annual meeting is now held, and guidance recognizes the vocational values of business education.

If the counselor is to understand the area of business education, it is important that business teachers keep him up to date on business trends through every useful avenue of communication, written or verbal. Since the guidance counselor can keep abreast of the broad aspects of career information only, the business teacher must take the responsibility for bringing to the counselor's attention current employment trends and new opportunities in business.

Does the guidance counselor in your school know: That since the advent of automation the need for clerical workers has increased? That typewriting and shorthand provide part-time employment for a large percentage of college students? That the demand today for a skillful secretary is greater than ever? That in our free enterprise system every producer and consumer, regardless of chosen profession or vocation, must have business and consumer know-how? (For example, even medical doctors cannot establish and successfully operate clinics without a knowledge of business fundamentals.)

In order to keep the guidance counselor up to date on the vocational values of business education, the business teacher must have first-hand information on the changing requirements of business. Have you gained recent knowledge of office occupational needs in your community through actual work experience or through studies of local business requirements? How can the business teacher educate others in these ever-changing areas when he has not been involved since the horse-and-buggy days of business? Numerous work-experience programs are evolving in connection with teacher preparation for vocational subjects which provide the business teacher with an opportunity to obtain optimum learning experiences in on-the-job situations.

One of the best ways to inform guidance counselors and parents, as well as school administrators and members of the business community, is through the business student youth organization, Future Business Leaders of America. Demonstration has long been recognized as an effective teaching method. What better avenue than FBLA for demonstrating that business education is basic to the needs of the outstanding student as well as the average student, that business knowledges and skills are fundamental in our present society, and that leadership is necessary for effective participation in business and community life?

Let's take an example of one such group about which a feature article recently appeared in a state education publication. After the chapter installation (which was attended by the school administrators, teachers, and parents), members immediately embarked upon a program of business and civic community activity which contributed to student growth, business-school cooperation, and business department publicity. Participation in FBLA activities at the state and national level brought chapter recognition and awards for "Miss Future Business Leader," "Mr. Future Business Leader," public speaking, spelling, vocabulary, and other business skills. (Needless to say, no parent objected to the local, state, and national news items or the radio and television publicity that his son or daughter received an award for achievement in these areas.) Another news release that a local business student was elected to a state FBLA office contributed to the image of the business student in the role of leadership—brought to the attention of parents, guidance counselors, and other citizens. Active participation in FBLA—and publicity of that participation through appropriate news media—is an excellent avenue of education for the guidance counselor and for the parents. Let FBLA be one of the communication forces building the image that your business department is a creative, challenging, active department contributing to the needs of all youth.

Since both parents and guidance counselors play such an important part in influencing young people, business educators are overlooking an important sphere of influence if they fail to utilize every possible means of communication.

# 3. Involvement Instead of Inertia

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Many teachers complain about the lack of enthusiasm their students evidence for the secretarial subjects, and the employers remark frequently that students entering business offices do not regard their work as anything more than a way of earning a living until they marry. Could it be that secretarial students are not encouraged to develop a feeling of involvement in what is now considered to be an important occupation?

Many students enter the secretarial program in high school because they do not expect to go to college or because they see few other opportunities for girls, and they have no clear idea of what secretarial work is about. They can hardly afford to be in this program for such superficial reasons. The secretary of today is required to employ so many skills, use such a breadth of knowledge, and develop such positive personal characteristics that no one can perform successfully on the job without having sound reasons for being in the field. In addition, it has been estimated that the average girl in high school today will work for 25 years. To obtain satisfaction from her work, she should be committed to it. We know, too, that one of the largest groups in the labor force is composed of married women who re-enter the field after several years of marriage and rearing children. These women can make a better contribution if they have had a continuing interest in their work from the period during which they originally acquired their skills.

If students are to feel a true commitment, teachers must do more than give lip service to the idea that students learn well and become truly interested in what they are doing when they have been encouraged to seek information under the guidance of a capable teacher.

Probably most teachers of secretarial subjects spend some class time talking about secretarial positions and the opportunities available to persons who consider entering the field. How often do they give the students a chance to explore for themselves the possibilities open to them? To develop a real interest in secretarial work as a career, students need to do something more than listen in class to what the teacher has to say about the field, as the teacher's remarks are often taken for mere talk.

### Objectives

By the end of the course the teacher will want to achieve the following goals:

1. To have helped to develop an understanding of the comprehensive and professional nature of secretarial work and the preparation that is necessary for success in the field.
2. To create a realization of the opportunities that are available, the types of jobs that secretaries fill, and the wide choice of locations and kinds of organizations that are possible.
3. To assist students to recognize the importance to the secretary of continuing education, either formal or informal.

Developing interest on the part of the students is not a one-lesson procedure. The teacher can start the project in one class session, but it must be carried on throughout the course. There is a series of activities that can be carried out in the secretarial practice class to accomplish the purpose of having students find out for themselves something about the work they propose to do.

### Method

A possible way of involving students in investigation of secretarial opportunities would be to conduct a "shake-up" session to help the students to formulate their own goals. Realizing that students have no specific guidance information, the teacher might guide the discussion by such questions as these: (1) What do you think a secretary really does in the office? (2) What types of offices could you work in? (3) Would you be restricted to any particular geographic area? (4) What would you need to know in order to get a really interesting job? (5) What kind of person holds a top-level job? (6) Can a secretary move up in the company and in the world of business?

At the end of the class session, the students will recognize that there is a lot to learn about what is supposedly their chosen occupation. Instead of telling the students the answers to the questions that have been raised, the teacher should give the class the assignment of finding out for themselves all they can about the possibilities for an interesting and rewarding career.

The class session will have been a success if the students have come to realize that they need to know a great deal more about secretarial work, and if they want to find out what they are able to choose among in selecting a particular position after graduation.

### Assignment

Each student should assume the responsibility for finding out as much as possible about secretaries and what they do. Individual assignments could be given to find answers to specific questions the class has raised, such as the duties of a secretary, the kinds of jobs available, and so forth. However, each person should be alert for information appearing in the newspapers and magazines and should feel responsible for making this information available to the others. Learning to use guides to current business information is a concomitant outcome of this unit.

A week or two later (the time should be announced at the end of the previously suggested lesson), there should be a follow-up discussion on what the class has been able to discover. The teacher should supplement the information obtained by the students when necessary.

In order to keep the interest alive during the semester and to help the students to develop a greater appreciation of the field, the teacher might like to use projects similar to these:

1. Place students in charge of a section of the bulletin board where they display information they find.
2. Have the students compete in finding the most interesting job of the month.
3. Interest the students in making a survey of interesting secretarial jobs in the community, including data on entrance requirements, duties, and the kind of person who could hold such jobs.
4. Invite graduates of the school who are working as secretaries to tell the class about their work.
5. Have students write to secretaries of famous people to learn about the kinds of work they do and what they need to know in order to carry out their duties. This project could well be tied in with the unit on the secretary's writing responsibilities.
6. Cooperate with the nearest chapter of the National Secretaries Association by inviting a member of that organization to speak to the class on career day.

At the end of the course, a class session should be devoted to summarizing what has been learned during the semester about the secretarial profession. If a continual effort has been made to help the students to collect information for themselves, the result should be a more comprehensive understanding of the challenge of secretarial work.

# 4. Why Your Students Should Belong to Future Business Leaders of America

**HAMDEN L. FORKNER,** Professor Emeritus, Teachers College,
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Business teachers have at their command an organization of business students known as the Future Business Leaders of America (high school level) and Phi Beta Lambda (college level). The organization serves as the means of giving young people who plan to enter the world of business an opportunity to learn about organizations and the way they work. The greatest contribution we as business teachers can make is to prepare young people for leadership as well as for employment. Because of this, the National Business Education Association has as one of its major activities the sponsorship of this organization for young adults enrolled in our high schools and colleges.

An advertisement of the Bell Telephone System in magazines of national circulation presented 17 presidents of operating companies of the Bell System, all of whom, as the advertisement stated, "came up from the ranks." Eight of these presidents began their employment with the Bell System as clerks. One began as a salesman. The advertisement goes on to say, "One of its (The Bell System) traditions is that its executives come up from the ranks." This organization is not unique in American business and industry. Young people with ability, initiative, imagination, business preparation, and leadership qualities are in strategic positions to advance to responsible positions. Business teachers have long given major attention to technical business preparation and in general have neglected leadership education. Never before have we had an opportunity to capitalize on the advantages of a national organization of business students as a means of developing other qualities. The Future Business Leaders of America organization provides that opportunity.

### General Plan of Organization

The plan of organization includes local chapters of FBLA in high schools, local chapters of PBL in colleges and universities, state chapters, and the national organization. All chapters and the national organization are supervised by advisory committees composed of business teachers, school administrators, business and professional men and women, and supervisors of business education who assume the responsibility for guiding the plans and activities of the chapters.

A local chapter may be composed of separate clubs for different groups of business students; for example, full time students, part-time distributive students, part-time office training students, and clubs made up of students in federally aided business and office occupations classes.

In each school the business teacher or head of the department, if there is one, should be the sponsor of the organization. Emphasis should be toward full student management of the chapter under the guidance of the sponsor. Any student who is enrolled in one or more business subjects, either in office or distributive occupations, and irrespective of whether such training is federally reimbursed is entitled to become a member of the local chapter upon complying with the established requirements of the organization.

The state chapter consists of delegates from each local chapter. These delegates meet once a year to transact business of the state chapter and to review the work of the organization, to conduct a state convention, and to lay plans for the national convention.

The national organization holds an annual convention to which each state chapter sends two delegates; the local chapters send representatives. The national organization at its headquarters office in the NEA Center in Washington, D.C., publishes the official magazine, THE FUTURE BUSINESS LEADER, for members of FBLA. THE PHI BETA LAMBDA NEWSLETTER is the official publication for members of PBL. The national organization promotes the broad program of activities at all levels, maintains a complete file and records for each local and state chapter, serves as liaison with the sponsoring organization, and directs the national convention.

It is anticipated that the number of local chapters will soon reach 5,000 and the number of individual members will be approximately 150,000 within a short time. Ten is the minimum number of students needed for organizing a chapter of FBLA. Some of the largest chapters operating at the present time have more than 450 members.

### Chapter Projects

The chapter of each club within large chapters should establish for itself a particular task, job, or project for the year. Some projects for the chapter are:

. . . Community studies to determine job possibilities for students with a business background.

. . . Studies to determine what former graduates of the school are doing and what their recommendations are for students now in school.

. . . Development of community handbooks describing the business activities of the community and suggestions for new enterprises.

. . . Excursions to neighboring communities and cities to study employment opportunities.

. . . Development of standards and a description of them so that students may know what business will expect of them as they seek employment.

. . . A speakers bureau of business students who can appear before high school and elementary school assemblies, luncheon clubs, young people's associations, and business groups to speak on such topics as "What the responsibility of business firms is toward young high school graduates" or "What the business graduate ought to know about getting a job."

. . . The making of films which show the opportunities for work in the community.

. . . The making of films which show what to do and what not to do when applying for a job.

. . . Planning with local TV and radio stations for a series of broadcasts regarding the place of the school in preparing young people for community life.

. . . A study to show how our government provides such services as the public school, public health, recreation, protection, highways, employment service, etc.

. . . Furnish stenographic or clerical service to the teachers, to a church, the Red Cross or some other welfare group.

. . . Merchandising students may assist in advertising, selling, or otherwise promoting school and community service projects.

### Suggestions for Organizing Local Chapters

The first step in organizing a local chapter is for the business teachers in the high school or college to present the plan of organization to their classes and secure a minimum of ten interested students who will become charter members of the local chapter. An existing business department club may be the nucleus of the chapter.

Each student who is taking a subject in the business department is eligible for membership. Scholarship should not be the criterion; often, students who are not outstanding need to have an opportunity to participate in organized club activities. Local chapter requirements, in addition to being enrolled in a business subject, should include a good attendance record, willingness to work with others in improving school and community relationships, a desire for self-improvement scholastically as well as personally, an ambition to work in the field of store or office occupations or to become a proprietor of a store or office, and a favorable attitude toward the school and its functions.

Before a local chapter is chartered by the National Business Education Association the group must submit to the National Office an application for a charter together with the names of officers, list of members, annual dues for each member, charter fee of one dollar, and an outline of projects which the chapter plans to carry out during the year. These projects may be any group activity that has for its purpose the development of initiative and responsibility, or the idea of community service on the part of the members.

If the question is raised as to whether superintendents and principals will permit an organization that collects dues from boys and girls, the answer is yes. The fact that the National Business Education Association is a Department of the National Education Association and, as such, has the backing of school people in general, indicates that FBLA is not a project for the purpose of money-making or exploiting young people, but a functional educational enterprise.

Businessmen will support the organization in your community just as the farmers and industry have supported the Future Farmers of America. They will advise your chapter and assist in sending delegates to the state and national conventions if you begin now to solicit their support in the formative stages of the local chapter. This is your real opportunity to correlate your work with business.

### Steps To Follow

The following suggestions will aid business teachers and students in organizing a chapter of the Future Business Leaders of America or a chapter of Phi Beta Lambda:

1. Use your present business club as the nucleus for the chapter. If no business club exists, talk to the students, to the school authorities, and to other teachers about the merits of this national organization. Appoint three or four enthusiastic students to serve as an organizing committee for the chapter.
2. Write to the chairman of the FBLA State Committee in your state (or to the National Office in Washington, D.C.) requesting a chapter charter application form, a sample chapter constitution, and the latest aids in organizing a chapter. Study carefully the materials you receive from the chairman of the State Committee and from the National Office.
3. When enough interest is aroused, announce the organizational meeting a few days before the date scheduled. Be sure to give publicity to the announced meeting.
4. Elect officers at the organizational meeting and select temporary committees for assistance in completing the prerequisites to securing a chapter charter.
5. Before writing the proposed constitution for your chapter, study the sample local chapter constitution, the constitution of your state chapter, and the national constitution.
6. Decide on a particular project which the chapter will develop for the year or semester.
7. Send the following items to the chairman of the FBLA State Committee: (If his name and address are not known, the items should be mailed directly to the Future Business Leaders of America, Box 47, NEA Center, 1201 Sixteenth Street, N.W., Washington, D.C. 20036).
   a. The completed charter application form giving the name of the school, name of the teacher who is the sponsor, the name of the officers, and the name of the principal or administrative officer of the school.
   b. A copy of your proposed chapter constitution.
   c. A brief description of the project or projects selected.
   d. The charter fee of one dollar. The national membership dues may accompany the application or payment may be deferred to not later than December 31 of the school year concerned. Applications for charters sent after December 31 should be accompanied by a remittance to cover the one dollar charter fee plus the membership dues for the current school year.

   e. A list of the charter members
   f. The state chapter dues should be forwarded to the chairman of the FBLA State Committee or to the person designated.

8. Elect or choose chairmen for the various permanent committees.
9. Form an advisory committee of men and women from the local community to work with the members of the chapter. This advisory committee may be composed of at least one school official, and men and women from the service clubs of the town or city, from the Chamber of Commerce, and prominent business and professional men and women. Members of the advisory committee should be persons who have a genuine interest in the welfare of young men and women and in their development as future leaders. Invariably, the invitation to serve on the advisory committee is accepted as an honor and with enthusiasm.
10. Arrange for the formal chapter installation service upon receipt of charter.

The name and insignia of the Future Business Leaders of America and Phi Beta Lambda are registered in the United States Patent Office under the Federal Trademark Act. Only officially chartered and currently active chapters and their members, operating in accordance with the requirements of their respective state chapters and the national organization, are authorized to use the FBLA and the Phi Beta Lambda name and insignia.

FBLA is an organization that deserves your support. It will give business students an opportunity they cannot have otherwise. Let's not pass up this opportunity!

# 6

# Utilizing Instructional Media

## 1. The Multiple-Listening Station in Shorthand Speed Building

**ELIZABETH VAN DERVEER TONNE,** Albany, New York

The multiple-listening station has long been accepted as a teaching device for the development of shorthand speed. New developments in equipment and tapes now make it essential to the teaching of stenography from the first month to the end of the learning and speed development program. However, most business teachers are still seeking the best way to obtain maximum usage from the equipment now on the market.

Minimum equipment for a classroom consists of a single tape recorder or dictation machine with an attachment (a jack box) permitting four to six students to use the output simultaneously. Maximum equipment consists of a console to which various output equipment may be attached (tape recorder, dictating equipment, record player, or some combination of these). The most efficient equipment permits teacher control at the console and selection of dictation by the student at his desk. The student picks up sound through a battery-operated set (as for the "wireless") or from a set attached to audio by wires extending from the output to his desk. Each type has many advantages and disadvantages which means that the person planning on installation should check carefully with someone who has had experience before purchase in order to avoid costly errors in planning. New purchasers should be certain that all recordings made by Gregg will be available on the equipment purchased and that the recording media will be easy to use and to catalog for use.

Such equipment will be useful in office practice and typing as well as in stenography, for this is equipment designed to provide for individualized instruction. Individualized instruction is desirable in all the areas mentioned. For this reason, the establishment of a stenographic laboratory for use only by stenographic students may be questionable. The equipment, however, should always be available to stenography students, but it should not necessarily be removed from the use of others. It is most important, however, that the stenographic teacher be assigned specific room space (the nomadic stenography teacher who carries his teaching materials from room to room manually cannot carry the equipment also). The room or rooms assigned should also be planned for use as study rooms for students' homework practice.

### Some Cautions and Some Techniques

No equipment can be the complete answer to better teaching. What are some cautions, some techniques to follow if such equipment is in the classroom? Let us assume the procedures to be discussed will permit selection of dictation from any one of three or four channels.

*Teacher.* The multiple-listening station does not replace the teacher. In fact, the teacher may need to be more active than usual to make best use of the equipment; at the same time, he will be more efficient. Lessons planned for a class today can be added to, deleted from, or reused for similar classes in the future.

*Dictation Pattern.* All lessons of the Gregg manual as well as some of the abbreviated longhand systems are now available on commercial tape. Furthermore, dictation for many of the lessons are in multi-channel dictation, meaning that the same lesson is available at two or more speeds to meet the varying needs of the pupils in anybody's class. The "spiral" pattern of dictation, which has served well in the past, is the pattern used in most cases. No student need be left behind because "he cannot keep up." The tapes also permit varying learning levels within the same class. It is no longer necessary for beginners to proceed in lockstep all through the manual. When differences in learning capabilities begin to appear, the lockstep can now be broken with the certainty that the student will not suffer and the teacher has the aids necessary for proper supervision and individual instruction.

Experience indicates that most classes split naturally into three speed groups—a lower, an average, and a fast group—so at least three tapes would be required with a possible fourth for extra incentive at either end of the scale of dictation speeds. However, the teacher who must start a multiple-listening program with limited equipment—a single tape recorder or a single dictation machine—and who plans to add additional equipment from year to year is probably fortunate. He is not then overwhelmed by the desire to make maximum use of too much equipment at one time. He will find that building his program gradually has many definite compensations. (This person should have as a minimum one station for each pupil, as many tapes as the budget will permit including sets, a listening station for himself, and one, or preferably two, output machines.)

*Student Participation.* Student interest in the dictating equipment will be high at the outset. However, student interest can quickly drop back to the varied kinds of interest to be seen among most student types in any shorthand class. It would be possible, unless supervision is thorough, for a student to select a comfortable "speed rut" and dig himself in a little deeper every day. This is perhaps more difficult to detect when the student selects his speed at his desk than when the teacher controls selection from a wall panel. However, the conveniences of student selection are so numerous that it is worth running the risk of developing an occasional rut-bound product.

Correction of this tendency and stimulation to better effort can be provided if the teacher dictates orally for part of each period. Students who have practiced under both conditions have said that the recorded voice is more likely to lull and that they need the occasional oral dictation. Therefore, some part of each period should be reserved for teacher-controlled, full-class participation.

On the other hand, full-class concentration is probably superior when each student takes dictation at his own level. For example, something humorous on the tape appears at different places for different speeds. It is easy to notice when each speed group reaches such a spot; a smile or a chuckle reveals that the students have noticed—this happens to everyone quite independently of what is happening to his neighbor. Such complete attention is seldom given to oral dictation. The earphones apparently make the individual feel the dictation is only for him. Outside noises do not distract nor do the activities of his neighbor interfere with his concentration.

If class size and room space permit the teacher to reach the desk of the student quickly, the student can benefit by personalized demonstration at the time he needs it most—when the teacher sees he is in trouble or when he senses his need and difficulty and requests help. A change from the standard two-column pad to an improvised three-column or one-column usage may mean the difference between getting the dictation and failing to get it. Improved handling of the notebook can be demonstrated to a class, but it makes a real impact when the student observes a demonstration performed for him alone. Writing the same material with the student and comparing writing habits is helpful. For example, does the student permit himself to lag unnecessarily? Is he too fussy? Is he too careless? Does he omit important parts of words? Should he be trying for higher speeds? Is he trying for speeds too far beyond his ability?

To permit this kind of student participation and teacher supervision, the equipment should be placed so that its use—the main purpose of which is individualized instruction—is possible. Setting up the room according to the easiest wiring pattern is not acceptable unless it is also the best instructional arrangement.

*Self-improvement.* The student can immediately proofread either transcription or his notes without consuming any more teacher time than is required for the teacher to set the machine to repeat the dictation. Proofreading from his notes reveals plainly the questionable outlines, emphasizes opportunity for phrasing which he did not hear the first time, and clarifies unfamiliar sections. Repetition of the same dictation at a higher speed after opportunity has been given to make corrections and to check outlines with the shorthand dictionary inevitably yields better results. Asking the student to check for self-improvement reveals the seriousness of his omissions. He can no longer labor under the illusion that he "almost" got it when he is required to fill in the bare spots with different colored ink. He comes face to face with his real need.

If need or ambition are present, the equipment is available for individual dictation and proofreading practice which is the path to self-improvement. Before school, after school, during free periods, even during some periods when other classes are in session, the equipment should be available to those who wish to use it. For convenience, study stations should be established near the console or jack so that the person using the equipment does not have to wander around the room.

Any student who finds himself lagging can force his own improvement to much higher levels through dictated practice than he can by copy practice. He can force a faster shorthand word recognition skill by reading from book notes as the dictator dictates. Sometimes the living pattern of the student is geared at such a slow pace that he never catches up to the dictation pattern proposed for him by his teacher; yet he may know his outlines well. A student's listening ability is probably more important to speed development than is recognized. Each time speed is raised the student must adjust his listening habits. Some students evidently find this difficult. Forcing the student to read 20 to 50 words faster than he can take dictation forces more rapid response and might develop faster mental outline development. The mental outline must exist before the outline on paper can be written.

### The Multiple-Listening Station Library

Although most commercial recordings, tape and otherwise, are good, many teachers will become enthusiastic about preparing their own materials. What should be recorded for a speed development class? Whatever the teacher has used formerly for dictation speedbuilding. Undoubtedly this would include selections from homework, special vocabulary or phrase articles or letters, timed tests, office-style dictation, specialized vocabulary dictation, and others. Each type can be placed on the recording media just as it would be patterned for oral dictation. Now, however, it must also be carefully indexed and filed for the future. Those who use it must adhere to the indexing plan.

Let us consider, for example, the five-minute tests published in the *Business Teacher.* Several teachers have complained that there is not time both to give the test and have students transcribe in a single period. (Many teachers probably permit the student to come in at a later time, collecting notes and transcript in the interim.) The time problem is aggravated when a teacher tries to dictate more than one test in a single period. To give all four tests to the same class would require at least two days and remove ten minutes or more from any single transcription period.

With the multiple-listening station, the problem is eliminated. Only one five-minute time period is required for dictation of all four tests. The teacher dictates the tests ahead of time, and in addition to having the tests available for the actual test also has them as long as desired for individual or class practice materials. In addition, should only a few students wish to transcribe, they can do so while others, using their headsets, take additional dictation or listen back for proofreading of notes. The flexibility of the use of class time and materials is limited only by the teacher's imagination.

*Do Multiple-Listening Stations—*

(a) *Help to build speed more quickly?* If they are used constantly from the first moment individual differences appear in the first semester of stenography, the answer it would seem would be *yes.* This is an area in which more research would be beneficial. Most use of the equipment has been in advanced classes; it should be available for all instruction in stenography.

(b) *Improve transcription skill without which speed development is useless?* Only if the teacher is able to program the recording media so that potential trouble spots in transcription are easily identified, acknowledged by the student, and worked on by him until eliminated. More skill in taking dictation does not build real stenographic skill—transcription. This consists of good common sense, knowledge of punctuation and grammar, good spelling habits, and correct typewriting technique.

(c) *Make teaching easier?* The answer could be *no.* If the teacher builds his own library, he may find himself spending more time in preparation than before. Also, until he learns what his equipment can do, he may find preparation time greater.

The answer could be *yes.* Most teachers talk too much. Talking is wearing. Dictating to a machine seems to prevent this happening. Also if several classes of stenography are taught in one day, the energy spent in dictation is used only once, but now it is classified as preparation time. In many instances, this time can be reduced or eliminated as the materials are used during successive years.

(d) *Stimulate teacher and students to greater effort?* This depends on the teacher and his use of the equipment. The students will respond positively as long as the teacher is positive in outlook. The equipment will not overcome the problems which can be created by a poor teacher.

## 2. Skill Building Through Reading Instruments

**ROBERT J. RUEGG,** Stenograph, Skokie, Illinois

It is possible to conceive of three separate phases in the learning of the skill. In the earliest phase the individual is eliminating unnecessary responses . . . that interfere with accuracy. The second stage arises gradually as a continuation of the first. In it the learner is accurate according to objective standards, but his responses are unnecessarily complicated and more effortful than they need to be. The third stage gradually emerges from the second. In it the learner is crowding together the necessary and sufficient responses—increasing his speed. The extent to which this compression develops is determined by: (a) conditions of practice—pacing; (b) the criteria used to evaluate performance—standards of correctness; and (c) the learner's capability.[1]

Business teachers may now make effective use of the same precision instruments which are today being used successfully by thousands of reading teachers. Use of instruments in business education is still in its infancy and there is much experimenting to be undertaken before the total scope of instrument training can be appreciated and put into use.

A variety of business education classes are being taught with the assistance of reading instruments. In addition, a number of basic instrument training experiments have brought many interesting teaching techniques to light. Some of the techniques are discussed here in an attempt to acquaint business teachers with the endless possibilities available in the area of instrument training.

It should be noted that the use of instruments does not replace the textbook or teacher. The instrument does not teach. It is used effectively in conjunction with text material and teacher instruction to develop and solidify the basic skill after it has been taught by the teacher.

The reading instrument used in the experimental programs discussed below was the skill building E.D.L.[2] controlled reader which has been developed especially for use in business education classrooms. Its slow speed, as compared to the speed of the standard Controlled Reader used in reading development, gives the business teacher an opportunity to pace skill building materials at speeds which allow time for student reaction to the reading stimulus.

During reading activity, the reader concentrates on the projected material and attempts to retain mentally the meaningful information. In skill building areas such as typewriting and shorthand, the student follows the reading activity with a prelearned response, whether it be the movement of proper fingers on a keyboard in typewriting or transferring written outlines into spoken words or printed copy in shorthand transcription. In skill building, the response is of major importance. The reading activity is used as the stimulus which sets activity into motion to produce a response. It is for this reason that controlled reader materials are prepared to make reading as easy as possible.

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[1] Stolurow, Laurance M. "The Psychology of Skills—Part 2." *The Delta Pi Epsilon Journal* 2: 29; June 1959.

[2] Educational Development Laboratories, Huntington, New York.

### Controlled Reader and Tachistoscope

Prior to further discussion, it would be best to answer the question which most often arises about reading instruments by describing the basic difference and similarities between the controlled reader and tachistoscope.

*Tachistoscope.* The tachistoscope is an instrument which presents material for a measured length of exposure. Projection is made with an open frame at the rate of one line per exposure. The time lapse between exposures is not automatically controlled. The purpose of the tachistoscope is to increase visual aggressiveness and attention on the part of the student as he attempts to grasp greater amounts of material in a shorter period of time and retain more accurately what has been seen. The tachistoscope is used to improve the seeing process. Its use in reading training and in clerical applications is most valuable.

*Controlled Reader.* The controlled reader is an instrument which automatically presents material at a predetermined, continuous, rhythmic pace which is measured in lines a minute. Projection may be set in a left-to-right moving slot motion which covers and uncovers print as it moves across each line. Left-to-right movement develops the directional attack of the respondent while substantially reducing regressions. Projection may also be set in an open slot motion which exposes an entire line of print at one time. With either motion setting, new lines of material move into view at a continuous, preset pace. Both the tachistoscope and controlled reader require the student to participate actively by responding to the projected material. The tachistoscope develops accurate seeing responses through a series of short exposures while the controlled reader develops the ability to respond rapidly, accurately, and regularly through presentation of material at a variety of continuous speeds.

### Concepts Developing in Business Education

*Typewriting.* Among a number of experiments were two two-week keyboard introduction experiments conducted at Walt Whitman High School in Huntington Station, New York. The first class got under way in September, while a second group made up of college preparatory students began typewriting instruction at the beginning of the second semester. The same basic techniques were used for both groups although some changes were made after observing student reactions.

*Beginning Instruction.* At the outset of each program, students were introduced to the typewriter and the basic typewriter techniques by normal procedures. Oral instruction was used with the teacher guiding student response by calling letters and words and observing reactions. Oral training was followed by instrument and textbook practice. It may be interesting to note that beginning students were asked to watch the paper in the machine during their response to dictated material. By watching the paper, students were instantly aware of their operative errors. They did not have an opportunity to develop the sense of insecurity or incorrect responses which in the beginning often arise when eyes are constantly held away from the typewriter.

*Instrument Instruction.* Once the teacher was confident that students were responding by touch to the proper keys in the first lesson, the controlled reader was put into use. At this point, all eyes were automatically directed away from the typewriting paper and machine. Students watched the screen and responded from projected copy. Any eye movement from copy to machine during projection was noticed immediately, thus allowing the teacher to take the necessary steps to correct the situation at its inception.

*Teacher Observation.* It was not necessary for the teacher to remain at the instrument once the drill began, thus freeing the teacher for observation of students. With all students receiving material at the same speed, visual and listening observations were intensified. Student errors and frustrations were instantly revealed through head and eye movement as intense concentration broke for a moment with each negative reaction. By listening to the sound of key responses, the teacher was soon able to tell whether projection speed was slow, medium, or fast in relation to student typewriting skill. At slow speeds, the group responded together and there was a pause at the end of each line. At speeds above student skill, student responses varied widely with a resulting sound similar to firing machine guns. Through careful observation, therefore, it was possible for the teacher to estimate student skill with a high degree of accuracy without requiring constant use of time for student checking of typewriting results.

*Projection Speed.* Exercises were projected in a left-to-right motion at speeds just above and below student control. It was not necessary for students to be aware of projection speed. However, projection speed and the number of times each exercise was repeated were both determined entirely by student results. If the class was having no difficulty with an exercise at a certain speed, the teacher repeated the exercise at a higher and higher rate until errors began to occur. The length of time students received copy at or above their typewriting ability depended upon the teacher's objective–speed development or complete control.

*Trial Runs.* After projecting an exercise a number of times, students were told that the results of the following run would be recorded by them on their 3 x 5 inch score card which they had previously numbered from 1 through 25. Following the first trial run, each student checked his paper and recorded the number of correct typewriting units—strokes in the beginning and words later. A second trial run was given on the same material with each student attempting to typewrite a greater number of correct units than before. With this technique, students were competing with their former scores. The teacher was constantly encouraging higher scores and commending better performance. While students recorded correct typewriting units after each trial run, the projection speed was recorded on the teacher's record card. By collecting student cards each day, it was possible to accurately record and analyze student speed and accuracy. Such an analysis was always a key to the speed of projection and type of material to be used the following day.

*Speed of Keyboard Introduction.* In both two-week programs conducted at Walt Whitman High School, a total of six and one-half hours of instruction time was available. In both programs the keyboard was introduced in nine class periods, thus following the pattern of the textbook in use. After watching student reactions during the daily projection training, the feeling arose that possibly the keyboard was being introduced at too rapid a pace. Before the students were able to obtain a reliable response to the keys introduced in the first lesson, additional keys were added, thus further complicating student reaction. As frustration developed, improper habits became more pronounced. It was felt that students should be trained to a higher degree of skill on the first keys before additional keys are introduced.

*Class Instruction.* The entire typewriting class received initial instrument instruction together. Later, as student ability began to vary from student to student, material was projected for short periods with an open frame—exposing an entire line of material at one time. Each student was instructed to typewrite as much of each new line as possible before the next line appeared. Students then counted the number of correct words typed and attempted to improve with each rerun of the exercise.

*Group Instruction.* After a few days of instruction, the teacher was able to separate students into groups determined by ability. That is, some students did very well, some were average, and others had difficulty in gaining typewriting skill. The teacher grouped students according to ability and presented instrument instruction for each group. Group instruction was accomplished by assigning textbook material to groups

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one and two while group three worked with the controlled reader. It should be noted that the assigned textbook material was analyzed to meet the needs of each group. Since the instrument made no unusual noise and could be used without darkening the room, students did not have to be grouped physically. As a result, there was no problem in assigning a student to a different group when desired. When group three had received 10 to 15 minutes of instrument instruction, group two worked with the instrument while groups one and three worked from the textbook. Group one moved into the projection unit in the same manner. The same film material was often used with all groups at various speeds. The teacher did not have to remain with the instrument training group at all times as students were instructed in the use of the equipment and were able to work alone. Grouping to allow for individual differences has been used effectively for years by reading teachers in elementary grades. Grouping techniques are also being used today in high school, college, and adult reading courses.

*Experiment Results.* At the end of keyboard introduction—six and one-half hours of instruction—students typed an alphabetic sentence for one minute. In both classes, students were typewriting at higher speeds and obtaining fewer errors than comparable classes not using instrument instruction. The college preparatory class rated higher as a group than the noncollege bound class. Results of all students typewriting an alphabetic sentence for one minute at the end of six and one-half hours of instruction were as follows: 20 percent had over 20 gross words a minute with the highest score being 26 gross words over one error; 56 percent typed over 15 gross words a minute; and 96 percent typed over 11 gross words a minute. On the accuracy side, 16 percent had perfect papers; 36 percent had one error; 16 percent had two errors; 16 percent had three errors; and 16 percent had four or more errors. In every case except one, those students with high gross words a minute scores had the fewest number of errors.

*Advanced Typewriting and Typewriting Improvement.* Advanced typewriting students may be urged to new speed and accuracy levels by using the basic instrument techniques. Material is projected at speeds which meet the needs of the students involved and the objectives of the instructor. Group work is also valuable at the advanced level. Materials for advanced typewriting are prepared for specific activities such as timed writings, tabulation drills, manipulation drills, and business letter exercises.

*Shorthand Preparation.* In the past, the major emphasis in shorthand preparation has been in the area of dictation. The teacher paces the shorthand writer by controlling the speed at which the material is presented. To increase the speed of response, dictation is given at faster rates than the student is able to write. At other times, dictation is slower than student ability to allow for writing practice and to maintain self-confidence. With the controlled reader, greater emphasis may be placed on transcription as a skill. In beginning shorthand, oral transcription—reading aloud in a group or individually—of shorthand outlines is spurred through projection of outlines at teacher-controlled speeds. To further assist the student, the teacher may hold projection on any line to discuss a particular outline or a special point of theory. When students begin to transcribe at the typewriter, the teacher may project a short business letter drill and a shorthand outline letter for transcription immediately prior to student transcription of personally written notes. Such a combination of activities is most valuable. The teacher has an opportunity to compare student skill in typewriting business letters from printed copy, transcription from written shorthand outlines appearing at a set pace, and transcription from written notes.

*Ten-Key Keyboard Instruction.* The controlled reader has played a major role in an extensive number of ten-key instructional programs which have been presented to business employees over the past three years. Ten-key touch operators have been training to a high degree of skill on three-digit numbers in a period of two hours. Development of skill up to eight digits a line with high problem difficulty has been accomplished in programs of one hour a day for 10 days. In each program, over one-half of the time was used for instrument instruction. Today, many business firms are using skill building instruments to prepare adding machine, card punch, and proof machine operators. One major firm has indicated that they have reduced employability decisions from six months to two weeks by determining employee skill potential faster through instrument instruction. With ever increasing need for trained ten-key touch operators in business, it is highly desirable for high schools and colleges to place a greater emphasis on this aspect of instruction. It is no longer enough to know how to operate a ten-key machine—touch development must be a part of the skill.

*Other Areas of Instrument Development.* In addition to the subject matter areas mentioned previously, controlled reader programs are being developed for filing, bookkeeping and accounting, business mathematics, the key-driven calculator, and other allied business subjects. In each area, directional attack, retention of information, and rhythmic responses are emphasized in skill development.

### Basic Benefits of Instrument Training

1. Pacing may be controlled at speeds above, equal to, or below student ability. "... in the beginning, the typist's motions are awkward, excessive, and diffuse. By increasing the pace—the rate at which the typist responds—some awkward components drop out."[3]
2. Concentration is maintained at a high pitch.
3. Motivation is increased. "A motivated learner will acquire a skill more rapidly than a less motivated one. Active participation by the learner will keep motivation at a higher level than will passive reception. . . ."[4]
4. A wide variety of drills are possible through use of left-to-right and open-frame projection.
5. Projection may take place in a room with light so that a variety of activities may take place at one time.
6. The teacher may move about the room during projection instruction to observe students by watching and listening.
7. The instrument may be operated by students in groups or individually.
8. The teacher may hold up projection at any point for review or discussion.
9. The teacher may take an active part in controlling student responses to skill-building activities.

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[3] Stolurow, Laurance M. "The Psychology of Skills—Part 1." *The Delta Pi Epsilon Journal* 2: 25; April 1959.

[4] Stolurow, Laurance M. "The Psychology of Skills—Part 2." *The Delta Pi Epsilon Journal* 2: 22; June 1959.

## 3. Improving Shorthand Learning Through Better Use of New Media and Equipment

**ARNOLD CONDON,** Illinois State University, Normal

This is the age of change or revolution. In the field of shorthand, we are also having a revolution. First of all, we have the new Diamond Jubilee Revision of Gregg Shorthand, which in itself is quite a revolution. However, it is probably in the area of new teaching media and equipment that the greatest revolution is taking place.

We, as teachers often become accustomed to doing things in a routine way; we hesitate and we tend to resist change. We are often afraid to try new methods or new media. Admittedly it does take some extra time to become familiar with the use of some of these media, but the improved results far outweigh the extra time and work involved. So let us live dangerously! Forget our fears and prejudices, and enjoy the thrill of experimentation and improved results. The writer has been particularly fortunate in having firsthand experience in the methods and media presented here. Unfortunately, space limits the extent of coverage. Actually, each media might well be the subject of a separate article.

### The Use of Recordings

There is little doubt that some type of recorded dictation practice is very desirable in the teaching of shorthand. The question as to which type you should choose depends on such factors as the amount of money you can afford to spend, how you expect to use it, your physical setup, and so forth. Basically you have two choices—disc or tape recordings.

*Disc Equipment.* Disc equipment is generally cheaper and is perhaps more flexible as to usage. Several companies, among them Dictation Disc Company and the Gregg Publishing Division of McGraw-Hill Book Company, provide a large selection of commercially prepared recordings which are of excellent quality and cover the entire spectrum of desirable dictation rates.

So far as mechanical difficulties are concerned, they are probably more foolproof than tape equipment. It is generally safe to allow students to operate such equipment, whereas with tape equipment such a procedure is perhaps not wise. It is not generally known, but it is possible for teachers to prepare their own discs inexpensively. Most office dictating systems do not record at a standard phonograph rate. However, Soundscriber does record at 33⅓ rpm. Soundscriber discs cost but a few cents each and stand up surprisingly well. Commercially prepared recordings may be placed in a library for student check-out for home practice.

The cheapest but most inefficient system is to have just one playback machine using a loudspeaker with all students taking the same dictation. The next step is to have two or three playbacks with multiple jacks so that several students can listen to each speed through earphones. A separate table might be used for each machine.

A surprisingly efficient record dictation lab is available from Dictation

Disc Company for as little as $300. This would include three battery-operated phonographs, each with six sets of earphones. Thus, with this system, three different rates of recordings could be played simultaneously accommodating a total of 18 students. Additional units may be purchased for $100 each.

*Tape Equipment.* Tape equipment is both plentiful and varied. Again, the most simple arrangement is to have one tape recorder with playback through the loudspeaker. The next step up is to have two or more tape playbacks, each placed on a separate table with multiple jack boxes to accommodate several sets of headphones.

Currently many schools are using a more sophisticated system with several playbacks housed in or on the teacher's desk, in a closet, or in a specially built console. Each student has a channel selector and volume control at his desk. In some installations, however, the selection is done by the teacher at the console.

The types of equipment available are myriad. In some, the tape is housed in cartridges, thus decreasing the possibility of breakage or having it unwind and become snarled. However, the tapes are prescribed as to length of dictation time. Some systems use a wide tape carrying as many as five channels. With this system there is not much danger of tape breakage, but there may be a problem in correcting errors and redictating.

Most of the more elaborate systems use wires to run to each of the desks in the room. In new construction this does not create much of a problem, since conduits may be built into the floor. In older classrooms, it is often necessary to run wires, cables, or flat-metal tubes on the floors. Some systems have been installed using flat metal conduits, which are strategically placed and then taped to the floor. Such systems seem to work very well. In an effort to overcome the disadvantages of on-the-floor wires, some wireless systems have been manufactured. These are actually miniature radio stations. In this case a transmitting cable is run around the room on the upper walls.

Perhaps one of the most sophisticated tape laboratories in the country is that installed at Illinois State University, at Normal. In this setup there are 60 listening stations, each equipped to select nine different channels. The 60 stations are divided between two rooms—the shorthand classroom and the shorthand practice laboratory.

Unlike most tape laboratories, this is a continuous-play system. The tapes are recorded on both tracks. The ends of the tapes are looped so that when the end is reached, the tape tugs the rocker arms and the tape is automatically reversed. This is the major advantage of the system, and one that other systems could well follow. A tape may be run indefinitely without supervision and it does—in fact, they regularly run 14 hours a day five days a week. Thus, students may practice in the laboratory at any time from 7 a.m. to 9 p.m.

*A Word About Usage.* Currently it appears that most dictation laboratories are used most extensively during the class period. In the usual high school situation this is perhaps necessary because a separate dictation practice laboratory has not been set up and probably never will be, since students would not have free periods available to go to the lab.

It is on the college level that dictation laboratories really prove effective. While they may be utilized in the usual ways in the classroom (particularly when dictation is to be given at various levels for a sustained period of time), their most effective use is to provide the stimulus for the daily practice work. The major part of the practice work is done in the dictation laboratory. This leaves most of the class period available for practice production or actual production work.

Another situation where the dictation laboratory really proves effective is in testing. In the usual live situation, the teacher would ordinarily be able to dictate only four speed tests, say at 120, 110, 100, and 90. By using test tapes, the teacher's effectiveness is multiplied by four. By using four test tapes, four takes could be recorded at 120, 110, 100, and 90, so each student may have four chances at his particular speed in the same period of time. This is a real advantage.

Probably one of the major uses of the dictation laboratory is for building dictation speed. But what is the best type of dictation for developing speed?

1. Extensive Speed Tapes: On these, the entire tape would be devoted to dictating several three- or five-minute speed tests. For instance, one channel would carry sustained dictation at 80, another at 100, and so on. The student would select his speed and take the extensive dictation at the prescribed speed indefinitely.

2. Progressive Speed Building Tapes: In this case, the entire tape would probably be devoted to developing speed on a single three- to five-minute take. One of the progressive speed-building plans would be used, such as the one-minute plan, stair-step plan, etc.

3. Short Speed Building Tapes: Here a single take would be dictated on different tapes at the desired speeds—say 80, 100, 120, and 140. The tapes would be brief—only two to four minutes in duration. The idea

here is for the student to repeat a given tape until he can get it; then advance to the next higher speed.

Perhaps all three plans have their place in speed building, but it would seem that plan two or plan three would be the most effective. It is doubtful that long sustained takes should be used extensively, because speed is best developed through planned repetition of short takes.

### Programed Learning

While most shorthand teachers will not get very excited about the idea of programed learning as a means of teaching shorthand, sufficient work has been done to prove that it is entirely feasible. Only a few people have worked in this area. Probably the most extensive work has been done by the writing team composed of Russell Hosler, Robert Grubbs, Harry Huffman, and Arnold Condon.

This writing team has been working on the project for the past three years, and two experimental editions have been put out. At first, the materials were used experimentally with individual students or with small groups. The results looked promising, so a revised edition was put out and used more extensively on both the high school and college levels. It has been found that shorthand theory can be learned at least as effectively using programed materials as when taught live. The dictation-transcription adaptations were then made with comparative ease with dictation rates ranging from 50 to 80 words at the end of the first semester.

Although programed materials can be used effectively for learning shorthand theory, it is not being suggested that teachers should stop teaching the subject in the usual manner. There are places, however, where programed instruction would serve a useful purpose:

1. For home-study courses
2. For adult or private business school courses under special circumstances
3. For student makeup
4. For remedial drill
5. For use as a workbook in conjunction with a regular class.

Perhaps an even greater value in the use of programed shorthand materials would be a theory review course. This should prove of real aid in teaching second, third, and fourth semester classes. Most teachers want to give some theory review each semester. To be effective, this takes valuable class time. With a programed review, the teacher would merely make the assignment, check to see that the work was done, give the periodic checkups, and relax in the knowledge that the theory will be mastered. This would be a supplementary pamphlet to be used in conjunction with any regular text.

Programed drills, unlike programed learning, do not attempt to teach anything new. Rather, they are used to provide quick reviews of things already learned. They reinforce learning and provide an easy means to automatize elements of shorthand that should be overlearned, such as brief forms, special phrases, joined and disjoined prefixes and suffixes, and so forth. They keep the student informed as to how much he really does know and direct him to do remedial work when necessary. The mechanical layout is the same as in programed learning. Any teacher, by using a little ingenuity, can make up his own programed drills. A sheet of paper is divided into three columns as shown.

| Check Response | Stimulus (what to do) | Student Response |
|---|---|---|
| (Shorthand outlines would be printed here) | Write in shorthand:<br>Chicago, New York, Los Angeles | |
| | (And so forth) | |

The students should be taught to use a 3- by 5-inch card to cover the check response column. In the student response column, he writes what is called for in the stimulus column. He moves the mask (card) down one line and checks his response. If he is 100 percent right, he goes on to the next line or frame. Should he make an error, he does remedial practice in his shorthand notebook which should always be by his side.

If the purpose of the drill is to automatize items, he should place his notebook over the student response column, again use the mask over the check response column, and repeat the drill until he can complete it perfectly within a specified time limit. In addition to using programed drills for automatization, the author uses them for two other purposes:

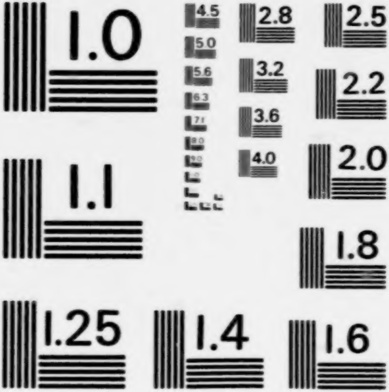
1. In writing beginning brief theory courses, he has found them a great time-saver and also an effective learning device. For instance, when presenting a new point of theory, probably only four illustrations of the theory point in question need be presented. The students concentrate on just a few words representing each point of theory presented. Incidentally, this also greatly reduces the time spent by the teacher in previewing the lesson.

Then a rather complete programed list of illustrative words is completed by the student. If he has really learned the theory presented in the lesson, he should have little difficulty in completing the supplementary programed drill in a short period of time. If he does have difficulty, he has two choices: he may go back to the lesson for review and then repeat the programed drill, or he may do extensive remedial drills on the items missed in the programed drill.

2. A similar type of programed dictation-transcription drill has proven quite successful in introducing students to the dictation-transcription adaptation. The setup of three columns as described above is used. The stimulus column presents in print the sentences or paragraphs to be written by the student. The check-response column, of course, presents the same material in shorthand. To be most effective, this programed dictation drill should be used in conjunction with the tape laboratory. It should be used prior to the tape practice. Surprisingly, the same combination may be used with equal effectiveness with both beginning and advanced shorthand classes.

### A Brief Report on Other Teaching Media

*The Typewriter.* The typewriter should probably be one of the most used of the teaching media. Time was when transcription was reserved for the most advanced shorthand course. Is it any wonder that we turned out so many stenographers who could apparently take the dictation, but who did a poor job of transcribing? Now leaders in the field are advocating typewritten transcription from the first assignment, and a new philosophy regarding transcription is being promoted. The approach is essentially psychological. The first step is to ascertain the students' typing rates on material similar to that to be used for the shorthand transcription. At the start, this might well be a simple paragraph, say of 80 words. Then the students are directed to practice reading the shorthand paragraph until they can read it as fluently as they could read it from print. Then the logical question is to ask, "If you can read this paragraph from shorthand as fluently as you can read it from print, is there any reason why you cannot type it as rapidly from shorthand as you type from print?" Fortunately, the students do not know that the usual standard is considerably lower than that, so they accept the idea and go to work on it. In a surprisingly short time, most of them are able to do just that, while some of the better students actually transcribe from shorthand notes more rapidly than they can type the same material from print.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MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A

*The Chalkboard and Related Equipment.* The chalkboard should probably continue to be one of our best allies in the teaching of shorthand. Have you developed the ability to write shorthand on the chalkboard while partially facing the class with the arm extended from the body so that students can see exactly what you are writing? With a little practice this is not the difficult procedure it might seem. Many minor items such as chalkboard rulings to help keep the teacher and the class on an even keel are being omitted in this discussion. Likewise, discussions on visual aids, flash cards, games, and so on are omitted. Before bringing this rather lengthy article to a close perhaps two other teaching devices should be mentioned.

*The Overhead Projector.* The overhead projector has been with us for years, but it is becoming more refined: smaller, lighter in weight, with rollers, and much easier to use. Now that most schools have photocopy equipment, it is possible for the teacher to prepare transparencies in advance that can be used from year to year. By mounting a series of flip-out masks on the transparency, only one line need be shown at a time.

*The Controlled Reader.* The controlled reader or skill builder has definite possibilities for the teaching of shorthand. It can be used to increase the speed of reading shorthand plate, of word lists, of brief forms, and so forth. It may also be used to pace shorthand dictation. Perhaps one of its best uses is to speed up shorthand transcription. More professionally prepared instructional materials need to be developed.

If one or more of your favorite teaching media have not been presented in this article, it is perhaps caused by lack of space or perhaps more truthfully that the contributor just isn't "hep" on this particular device. After 32 years spent mainly in the teaching of shorthand, this writer has tried many, many methods and media. He still "gets a kick" out of teaching shorthand and is continually trying new ideas and devices. That is what makes life interesting!

In this age of change, many new methods and media will continue to be developed. If we are to keep pace with this change, it is essential that we as shorthand teachers maintain an experimental mind and continually seek to improve the teaching of our favorite subject—shorthand.

# 4. Television, the 21-Inch Classroom

**CAROL PRICE,** International Business Machines Corporation,
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"What is your favorite subject? Who is the most unforgettable individual you have ever known? What is your most admirable trait?" These questions and answers echoed throughout a prominent business educator's recent workshop. I must admit that the question: "What is your most admirable trait?" stopped me briefly—I can't tell you exactly how long—but there is very definitely a lapse in my workshop notes following the question. I can recall mentally scanning a list of admirable traits, none of which seemed exactly to fit me. Refusing to admit the apparent lack of admirable traits, I continued the mental scan, only to find my thoughts reflecting to Channel 6 in Denver, an educational television studio, where I taught several series of business subjects.

I suppose that subconsciously I hoped for an answer from my experiences in the "21-inch classroom." But, strangely enough, it was impossible to think about a program well done, without the image of a not-quite-up-to-par program creeping into my vision. The success of educational television can generally be attributed to a combination of sufficient groundwork laid by administrators; careful planning of the curriculum by planning committees; close cooperation with the studio technical staff; and, finally, adequate preparation by the television teacher. It is definitely a team venture—not a one-man show!

### Preparation Needed

Few teachers have had professional preparation to teach on television. The most outstanding television teachers have a thorough knowledge of their subject, are enthusiastic and can transmit this enthusiasm through the eye of the camera, believe firmly in the concept of automated teaching—and have a small amount of "ham" in their personality. It is easy to believe in television as a teaching medium, for there are many advantages to it:

1. Each student has a front row seat.
2. According to recent studies, students learn as much as those taught in the conventional classroom.

3. Television brings the opportunity to use many sources of audio-visual materials to provide richer learning experiences.
4. Cameras can magnify and show more clearly objects or procedures that illustrate instruction.
5. Television brings the good teacher to more students. This is particularly important in some areas where college enrollments continue to climb, and where there are teacher shortages.
6. The teacher has an opportunity to view his own performance by means of video tape recordings, thus making possible a self-evaluation which can result in better teaching.
7. Review or refresher courses can be offered in many areas.

Business teachers, being progressive educators, have proven these advantages by pioneering many television classes. The most frequently taught business subjects have been typewriting, shorthand, and office procedures. In the future, such naturals for television as economics, business English, bookkeeping, letterwriting, general business, and business law will undoubtedly be added to the curriculum. For example, picture a business law class taught by an imaginative lawyer-teacher. He could bring business law into the classroom using resources and visuals which a conventional classroom teacher would be unable to parallel. He has only one subject on which to concentrate—and not three or four preparations, as in the case in many classroom situations.

Many teachers have resisted television as an educational medium because it is a one-way communication system. The objection is equally applicable for the student and teacher alike. It can, but need not, reduce the quality of instruction. The preparation of program materials is the key difference between conventional instructional techniques and television teaching methods.

### Planning the Lesson

In planning a television lesson, it is important to:

1. Begin and end each program with an attention-getter pertaining to the current lesson.
2. Allow a few minutes each day for review.
3. Plan a variety of teaching techniques including visual aids and audience participation devices since the interest span of the television audience is shorter than in conventional teaching situations.
4. Plan carefully the presentation of new material; surveys show optimum learning takes place during the middle ten minutes of the telecast.

5. Time the presentation carefully. A recorder is an excellent aid to the television teacher.
6. Take advantage of the camera by planning closeup shots of objects or forms being discussed.
7. Have a sufficient amount of material available so there is no possible chance of ending a program with "time on your hands."
8. Arrange frequent checks on the material presented. Progress checks in the form of tests flow in when requested. Survey cards may be used.
9. Be sure students feel that they can contact the teacher if necessary. The teacher may receive telephone calls at the studio before and after each telecast and also answer personal cards and letters. A few questions may be answered on the air. The television teacher soon learns to anticipate questions and answers them before they come up.

If these points are followed in planning a series and if the lessons are presented in an enthusiastic manner, the series is bound to be a success. There are pros and cons in television teaching as there are in conventional classroom teaching but with this major difference—each student can be right at the teacher's elbow only in "the 21-inch classroom."

# 7

# The Impact of Automation

## 1. Data Communications: New Term, New Concept, New Challenge

**NORMAN F. KALLAUS,** The University of Iowa, Iowa City

"If you stay on your toes, you'll never get run down at the heels!" Business teachers, perhaps more than any other group of teachers, must continuously stay on their toes to keep abreast of the never-ending developments of science that are converted to the use of business. In this article attention will be focused on data communications and some of its contributions.

### Data and the Business Teacher

During the past decade the business teacher has been subjected to a relentless barrage of advertising, publications, educational furor, and sometimes even hullabaloo concerning the importance of data in business. As a result

| *instead of* | *we now* |
|---|---|
| doing office work | process data |
| dealing with number and words | deal with information |
| training office clerks | train data processors |
| emphasizing the paperwork | emphasize handling of information |

On the surface, it may appear that we are merely juggling words, using fancier, newer expressions. Such, however, is not the case. Conceptually, each of these changes represents new thinking, new developments, new controls for dealing with the organization and administration of information.

All business teachers must understand these new concepts and keep the new distinctions in mind. With the "new look" that office work has taken on, it is important that our students be aware of the purposeful nature of their work in the office. The clerk, like the manager or department head, handles business information; but the extent, frequency, and degree of decision making that each engages in, determines his individual role. In any case, each makes an essential contribution to the processing of data. Each processes and communicates information.

Machines, especially the punch-card machines and the computers, gave an electric spark to the term "data." These machines were quickly applied with Madison Avenue fervor to the handling of clerical work and became, in effect, data processors in somewhat the same way that some of the office clerks were—and still are, for that matter—data processors.

*After only ten years of experience* upon which to judge the contributions of these machines in our scheme of things, certain points become clear. As a result of this brief data processing history, many business teachers

| *are now* | *instead of* |
|---|---|
| beginning to accept data processing | fretting about it or fearing it |
| working like beavers to learn all they can about it | hoping it will go away like any other fad |
| searching for ways of orienting their students to data processing | assuming it is not proper subject matter for high schools |
| learning that data processing is essentially simple and as old as office work itself | feeling it is too technical to be understood by anyone except at, say, the programer level. |

Business teachers are now reading more and thinking more about data processing than about any other single topic. For example, in a doctoral study completed in August, 1965, at The University of Iowa, James Hallam found that high school and college business teachers expressed concern over (and wonderment about how to deal with the subject of) data processing five times as often as any other topic!

This is certainly an eye-opening fact, especially considering the late entry of data processing into the business curriculum. With the increasingly fine facilities and programs of data processing study in our colleges and universities, technical schools, adult programs and of those programs maintained by equipment manufacturers, there is no good reason why business teachers should not be informed about a topic with which they will deal frequently throughout their professional and personal lives.

### A New Concept: Data Communications

Life grows in complexity! Just when you feel you understand to your own satisfaction a new topic like data processing, along comes another new concept closely related to but in some way separated from data processing. Such a new concept has come along; the new concept is *data communications.*

The key part of the term may well be *communication.* We all recognize that no matter how good an idea a writer has, it is worthless unless it is made available to and received by an audience. No matter how fine the voice of a soprano or an orator; no matter how accomplished the actress —these talents are wasted in an *untransmitted* form. The business report, the business letter, the office memo, the purchase order, the record of sale, the inventory report, the job application—all forms of business information—are essentially valueless unless they are *moved!* When we move information from one place or person to another, we are communicating. When we move business information or data, we have data communication. We move information through the mails, by telephone, in speeches, concerts, meetings, daily conversations, and by many other methods. And, of course, in this period of advanced technology, we move information—communicate or transmit data—electronically. In a technical sense, data communications may be defined as the movement of encoded information by means of electronic transmission systems.

Notice that primary emphasis in the definition of communication is placed upon the *movement* of information because the context in which data communication is used is restricted largely to numerical data and other factual information (sales specifications, order data) that flows from data processing machines. This, then, is but one key aspect of the traditional communications process which views communication as the *mutual interchange of ideas* (messages) between a source and a receiver. In the total communications process such complex human factors as semantics, psychology, sociology, and the skills of reading, writing, speaking, and listening are, of course, involved. Data communications, on the other hand, is "machine-to-machine communications."

In today's modern business, the electronic computer plays a key role. Such computers process data at fantastic speeds. When connected to related equipment at remote geographic locations, they can communicate data to receiving machines over long distances. Thus each on-line location in a computerized network has almost instantaneous access to transactions from various parts of the network. Major business firms maintain communication networks. The centralized reservation system maintained in Denver by United Airlines is an example. Westinghouse and Eastman Kodak control operating data and paperwork of their farflung inventories and sales through equipment which is controlled at their respective home offices.

While the computer is essentially a processor of information, the story does not end there. To have a complete information system, the processed information must be transmitted or communicated. The data must eventually end in the hands of the person who is to use the information; hence, a system to communicate or move such data must be planned, organized, installed, and personnel must be trained to use it. An oversimplified view of data communications, the newly recognized area of business information systems theory, would show this order of events:

1. Design and install the over-all system for handling information (the business information system)
2. Provide the means for processing the information (the data processing system)
3. Move the information to the proper person or office for further use (the data communications systems).

Whereas in the early days of the data processing emphasis, the actual manipulation of the data was considered to be the most important segment of a business information system, it is now realized that to complete the communications process, people and machines must take the information that is processed by the computer and "move" it to the proper place at the prescribed time and in the right form. Data communications is, therefore, a new focal point. It is a logical extension of the data processing function. It is the culminating phase of a business information system.

### The Business Teacher—Quo Vadis?

Office education teachers should study and understand this new concept of data communications for it will play an increasingly significant role in the handling of business information and in the performance of office work. A publication of the American Telephone and Telegraph Company on data communications in business is recommended as an entry wedge in this area of study.

The business teacher must try to set his mind straight—and at rest—by developing the proper perspective about the role of machines in office work. Supposedly, machines reduce the amount of work that man must do. They are his slaves. If, however, you feel that you work longer and harder these days even though machines are doing more and more work for you, you are probably right! So, keep on your toes—maintaining, of course, the "man-is-master-over-machine" philosophy that is basic to controlling the office function.

## 2. The Impact of Information Processing on the Development of Clerical Employees

**ARNOLD E. SCHNEIDER,** Western Michigan University, Kalamazoo

A revolution in the clerical processes has been under way during the past two decades. This revolution has changed the scope, the usages, the methods, and the outcomes of many of the recording functions with which we have been familiar. It would appear that the impact of this change can be labeled "The Information Processing Revolution." Two things have been going on hand-in-hand and they have been interdependent. We have had a tremendous increase in the amount of paper work and paper processing that has been necessary for the conduct of business. The staggering sums that are expended for paper work seem to grow continually. The following recent newspaper release is a testimonial to the rapidity and the virility of this paper work growth.

PAPER PUSHER ARMY MOUNTS
Washington, October 3 (UPI)

One out of six employees in the nation is a "paper pusher," making up an army of office clerks who outnumber all United States farm workers and still the paper work piles up. Stanley C. Allyn, chairman of the National Cash Register Company, cited these facts. He warned that the United States may become "a nation of clerks" unless the trend is checked.

In a dinner address before more than 500 Washington business and government leaders marking the firm's 75th Anniversary, Allyn said that the nation spent more than $2 billion on labor saving office devices last year but still wound up with 200,000 more clerks. He said this growing stack of paper work required 9 million clerks at an annual payroll cost of $32 billion. The load he said is growing at a "staggering rate."

Allyn predicted machines under development would relieve much of the problem but added that the "push button office is not just around the corner." By way of further statistical presentation, we can note that today there are twice as many office workers as there were in 1940. During the last 50 years as industrial production increased 70%, the number of factory workers increased 85%. During this time, the number of office workers increased 700%. These office workers are earning more than ever before, yet, their production has not risen with their salaries.

There are reasons for the growth of "paper work." These reasons are inherent in the very type of industrial civilization of which we are a part. The inference that all of this paper work is, perforce, repetitious and mere operation of record is neither accurate nor justifiable. The continued growth of paper work has grown out of the following factors: (a) The relation of government to business with its need for accurate income tax records, and other types of governmental informational processing; (b) The dramatic increase of service industries such as life insurance, banking, home ownership, credit, and small loan business; (c) The continuing need for accurate and up-to-the-minute information for management activities—long range planning, quality control, marketing analysis, cost comparison, product profitability, production control, production comparisons, and decision making; and (d) The necessity for historical and statistical flow of information.

This then is the setting and this is the climate in which we find the need for young people trained in the secondary schools who can enter into the bloodstream of the world of business and perform efficiently, satisfactorily, effectively, and continue to grow. The need for capable, well-trained young people is best described in the following quotation:

> It is one of the paradoxes of automation that the more we entrust our work to machines the more urgent it becomes to find the right human beings to handle them. Away back in the early days of the electronic data processing movement, it was apparently the widely held belief that computers were different; hardware was the thing, not hard thinking. Given the right wave-form, the most ingenious array of flip-flops, and a really fashionable beat time, all could not fail to be for the best in a world where every manufacturer's prospectus pleased and only man was vile.
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> But things have not turned out like that at all. Quite apart from the numerous bulletins emanating from our more venturesome cousins overseas, we can derive from the experiences of our modest handful of British installations more than enough support for the conclusion that . . . the success of a data processing installation depends at least as much on what goes on outside the computer as on what goes on inside it. Indeed, no attribute of the electronic computer is more startling than the pitiless clarity

> with which it exposes, and proclaims, the capabilities and shortcomings of those concerned in its use.[1]

Interestingly enough, the writer has had the opportunity of visiting with a number of men who are highly placed in industry and business and who are responsible for the implementation of electronic data processing equipment within their organization. Again and again they have reiterated that one of the fundamental needs is for competent young people who can process the information-bearing papers prior to their being fed to the machine. Business, they say, needs more competent people because, as Carl Marquardt, vice-president of Service and Systems for State Farm Insurance Companies has stated: "If you feed garbage to an electronic data computer, you will not get fruit salad coming out of the other end."

### Productivity and the Clerical Employee

It would be well to review some of the current thinking that management entertains in regard to productivity in the office. By way of background one can note that just a few years ago the office was considered little more than a mere adjunct to the main task, which was the production of goods. Today all that has been changed. Business is more competitive than ever before. The industrial process has become so complicated, the myriad activities of distribution, merchandising and sales have become so diverse and complex that the office has taken on a completely new role. If top management is the brain of the business organization, the office today has become its nerve center. It is a nerve center moreover which must function with incredible efficiency. In today's competitive times, management needs more information than ever before; and it needs that information to be more accurate and to be delivered with greater speed.

In this setting, management has necessarily tackled the overriding problem of office productivity because more and more it is in the office that the opportunity for profit can be maximized or that potential loss can be minimized. In a special report to management prepared by *Dun's Review and Modern Industry* entitled, "Office Productivity: New Paths to Profits," the following statement appeared:

> Despite the tremendous expansion of the clerical work force the job to be done in company offices manages to grow even faster. Stepped up

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[1] Allyn, J. "The Selection and Training of Computer Personnel." *Electronic Business Machines.* (Edited by J. H. Leveson.) New York: Philosophical Library, 1960. p. 167.

mechanization, continual improvement in the systems and procedures, and more effective management of personnel are the main dykes that management is now constructing against the paper work flood. Without them, it would be swamped by a sea of invoices, sales orders, and production tickets—not to mention interoffice memos on the need to reduce paper work costs.

Searching out the specific reasons for the continuing slow pace of office production companies which have investigated the problem pinpoint these areas:

1. The shortage of clerical workers in many parts of the nation which results in high turnover and the absence of the real incentive for workers to boost their output to hold onto their jobs.
2. Ineffective supervision of clerical employees.
3. Neglect of engineering techniques that have brought big gains in plant productivity such as work measurement, performance standards, work flow analysis, work simplification, among others.[3]

In a survey of 275 companies the following tough trouble spots in today's offices were specifically mentioned: (a) Poor training of office workers, (b) Employees allowed to spend too much time away from their desks, (c) Poor scheduling of work, (d) Lack of performance standards, (e) Poor attitude (dilatory) of most clerical workers, and (f) Lack of work measurement programs.

To correct these areas of obvious deficiencies and in order to make office people more productive, the following avenues and approaches were suggested: (a) Use work measurement techniques, (b) Use job descriptions, (c) Use clerical procedure manuals, and (d) Tighten scheduling of work.

Among the methods to be employed by the companies are: (a) More thorough training, (b) More reliable testing, and (c) Improving the office environment as an efficient operation.

### Inservice Training Programs for Clerical Employees

It will be noted that among the major avenues which companies have suggested as fruitful possibilities for increasing the effectiveness of clerical work within an organization is that of improved training. Most of the beginning employees in business organizations who do the routine paper processing prior to its entry into the electronic automated system are inexperienced individuals fresh from secondary schools. These young persons are devoid of an understanding of the nature of the activity with which they are related. They have no concept of the manner in which an initial error escalates within the automated systems as the number of "checks and reviews" inherent in an older and more people-related system diminishes. If errors are to be reduced, if efficiency through accuracy and an increase in speed is to be achieved, then this goal of maximizing the clerical effectiveness within the organization will take a long step forward if sound employee training is undertaken and followed through.

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[3] "Office Productivity: New Paths to Profits." *Dun's Review and Modern Industry*. September, 1960.

Our thesis here is that if management is to attain its objectives through effective supervision, appropriate techniques and systems, and, finally, through the usages and application of modern hardware, the fundamental necessity is for efficient clerical employees to make the promise of maximum results blossom into a reality. A program for effective clerical training may be achieved through the following action steps:

1. Every clerical position should be systematically analyzed.
2. Comprehensive and detailed training guides should be developed for each of the positions.
3. Lead workers should be carefully trained in the techniques of training new employees.
4. Supervisors should be thoroughly trained in the art of job teaching.
5. Supervisors should be trained to follow through on the "new employee training activity" to make sure that effective teaching and effective learning have taken place.
6. Standards should be established for job performance.
7. A follow-through program should be implemented supplementing the job training with adequate job orientation so that the work of the employee becomes meaningful and purposeful.
8. Specific job outcomes should be emphasized by supervisors and managers. For example, if accuracy is a fundamental requirement of a particular job, then the need stress for accuracy should be made and it should be related to the outcomes. If speed is essential, the proper emphasis should be placed on this quality.
9. A "teaching guide" for the various positions should be developed to make sure that difficult areas are properly covered and that a planned sequence of work is presented to the novice.
10. A climate which is conducive to success for the neophyte should be established. Fear breeds failure, and the beginner needs the assurance that he has the ability and capacity to succeed.

Systems, procedures, work flow analysis, work measurement, and hardware are all tools and methods which in and of themselves are barren of the promise of sound results until they are related to the human side of the enterprise. The Achilles heel of the *man . . . machine . . . environment* triangle is still man; and as the capacity of the automated aspects of our environment increases in its potential, the need for effective human beings increases in a geometric ratio. During the past few years we have focused our attention on the continued need for training and retraining the people phase of our organizational complex. Business has embarked on training activities on many fronts ranging from technical courses to high-level managerial and executive development. Yet, it is at the basic level, where the new employee is entering the organization surrounded by other employees and directed by a first-line supervisor, that the work of the organization begins and where desired outcomes are based. It is here that the supervisor through the tool of proper and effective employee development shapes the cost picture of the clerical efforts.

## 3. Data Processing

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The glamour, pace, contact with people, and intellectual stimulation that careers in electronic data processing offer cannot be equalled by many other fields. The use of the computer has become almost synonymous with automation. Automation is the mechanization of thought, sensory, and control processes. The Department of Labor defines automation as the partial or full replacement of workers as a source of energy and/or control by machines.

Automation means different things to different people. In the large office today, automation is the electronic processing data. The unit-record type of automation can produce many different types of reports with an accounting machine or TAB as it is called. The multi-function machine system is computer-based.

Punched cards were first used for processing data in the census of 1890. The first large-scale scientific (analog) computer was not developed until 1930. A large insurance company installed the first business (digital) computer in 1954. Today, American industry owns or rents some 25,000 computers. By 1970, it is estimated that at least 50,000 computers will be in use.

### Two Types of Computers

There are two types of computers: analog and digital. The analog computer measures magnitudes such as pressure, current, or degrees. The thermostat's coming on when the temperature goes down illustrates this type of control. This type of computer has bleached the blue collar of many industrial workers. To cite two examples, the oil industry is 95 percent automated, and recently a cargo vessel was unveiled which handles cargo electronically.

Computers that count things are known as digital computers. This type of computer is used for business applications. Computers do three things. First, they add and through addition are able to multiply, subtract, and divide. Second, they are able to store in memory as we do eggs in cartons. The most important part of what computers do is to compare—to use logic to tell whether something is A, less than A, or more than A. When you combine at fabulous speeds these processes of addition, storage, and comparison, you are bound to cause changes.

Data going into the computer is coded. It is surprising how much that comes to us through our eyes and our ears can be coded. Morse code and television are examples. There is a theory that anything that can be expressed quantitatively can be coded. This is the possibility with computers. The appeal of computer-processed data is the timeliness and accuracy of the work produced in the face of increasing volume and complexity.

The limitation of the computer is that machines are unable to perform "value judgments." But computers are extremely good at speed, accuracy, and obedience, and impervious to fatigue, boredom, and opinion.

### Uses of Electronic Data Processing

Early use of EDP was centered on mechanizing clerical operations such as inventory control, billing, and payroll. This control facilitated tactical decision-making. As equipment became more sophisticated, it was possible for management to begin to concentrate on applications to facilitate planning and strategic decision making.

Today, EDP is becoming a basic tool for both computational and noncomputational applications. Computational applications include control, design, simulation, and information retrieval. Noncomputational applications consist of pattern recognition and computer-based instruction.

*Control.* Computers are used for inventory, payroll, checks, invoices, reservations, movements of trains, and linking communications. The flight of a missile is controlled by instantaneous correction of deviations from the planned course.

*Design.* Computers can make intelligent guesses, calculate the characteristics of each guess, and check it to specifications. Buildings, bridges, power transformers, and automobile transmissions have been designed with the aid of a computer.

*Simulation.* Computers can test the formulation of numerous operating plans expressed mathematically, and then select the most productive plan. Simulated models of equipment, plants, businesses, and even the nation's economy, can be tested for certain variables.

*Information Retrieval.* Computers can be used to retrieve data and information for effective timely use in almost any phase of life where such data are recorded. Reports can be generated, or references, abstracts, or entire documents which are stored may be retrieved. For example, a lawyer may consult the computer for references on a case he is working on, or a hospital may use instantaneous printing of a patient's bill as he checks out.

*Pattern Recognition.* Characteristics which occur frequently enough to be classified as a type or pattern may be identified. Medical histories may be searched to identify patterns, or eventually characteristics of successful employees may be identified.

*Computer-Based Instruction.* Programs are used in the computer which ask diagnostic questions. Units of instruction are then programed according to student response.

While early installations of computers were found under the supervision of the controller, additional applications for the other functions of business are being included under a new administrative unit, the computer center.

The computer center is a means to an end, not the end in itself. The end is sound management decisions in all functions of the organization. The path of data is from business functions to the computer center where it is made more useful and then back to the function to be forwarded to top management. Since the computer is a management tool, it is necessary for those directing business functions to have computer know-how, and for computer specialists to have business understanding.

Career opportunities in EDP can be found either in firms utilizing EDP or with the manufacturers of EDP equipment. Manufacturers of EDP equipment naturally have need for scientists and engineers to further develop machine capabilities. These positions will include designers of machinery, draftsmen, systems engineers, mathematicians, and logicians. In addition, machine builders, machine installers, service repairmen, and programers will be required.

Management positions requiring a high ability to think, to analyze, to make decisions, and to assume risks will be found at the highest level of careers in data processing. These positions require both knowledge and experience, and they are usually filled by college graduates experienced in the firm.

Typical job descriptions in data processing are:

*Project Planner* (or data processing manager)–Plans, coordinates, and directs the data processing system. Solves problems in engineering, mathematics, numerical analysis, statistics, and data reduction. The salary ranges from $8,000 to $23,000; average, $12,500.

*Systems Analyst*–Devises broad outlines of system requirements and layout. Develops procedures to process data by means of EDP. Balances men, methods, and machines to achieve greatest efficiency and most useful information in a given application. The average salary is from $500 to $1,000 a year more than Programer 1.

*Computing Analyst*–Formulates mathematical statement of business problems and devises procedures for solution of problem.

*Programer I*–Conducts and coordinates programing assignments of a broad and complex specific, technical, and business nature. Must have broad knowledge of problem definition, analysis, flow charting, coding, and checkout. May head a team of programers whose assignments differ in complexity. The salary ranges from $9,000 to $15,000.

*Programer IV*–Writes, tests, and evaluates a segment of a program. Salary ranges from $5,000 to $8,000.

*Coding Clerk*–Converts programer instruction into special machine language or code, using predetermined coding system.

*Supervisor of Computer Operations*–Plans, coordinates, and supervises the operation of a data processing installation. Salary ranges from $7,000 to $11,000.

*Supervisor of Tabulating Operations*–Supervises tabulating section processing punched-card data in the preparation of statistical reports. Note that this is usually electro-mechanical equipment, and is not as flexible as the computer. Salary ranges from $6,500 to $9,000.

Peripheral equipment operators of computer equipment include:

*Console Operator I*–Operates an electronic computer through a central control unit (console). May require a knowledge of programing. Salary ranges from $6,000 to $8,500.

*Console Operator III*–Performs routine duties in operating an electronic computer. Often considered a training position. Salary ranges from $4,500 to $6,000.

*High-Speed Printer Operator*–Converts data printed on reels of tape into printed records.

*Data Typist*–Operates electric typewriter equipped with special keyboard to transcribe coded program instructions or data onto magnetic tape.

*Card-Tape Converter Operator*–Operates machine which automatically transcribes data from punched cards to reels of magnetic tape, or from punched paper tape to punched cards.

*Tape Librarian*–Maintains files of magnetic tapes and issues them to electronic machine operators as needed. Classifies, catalogs, and cross-indexes reels of tape according to data content.

Peripheral equipment operators of tabulating equipment include:

*Tabulating Machine Operator*–Operates a variety of tabulating machines to perform sorting, collating, calculating, and listing of data. Assists with the development of wiring diagrams and wires boards for complex machine operations. Instructions are given these machines through the wiring of the boards.

*Key-Punch Operator*–Operates alphabetic and/or numeric key-punch machines in recording a variety of data onto punched cards. Verifies punched cards. The holes represent data or coded instructions.

New clerical occupations created by EDP which are unique to banks include:

*Reader-Sorter Operator*–Operates electronic check-sorting equipment.

*Check Inscriber or Encoder*–Operates machine that prints information on checks or other documents in magnetic ink to prepare them for machine reading.

*Control Clerk*–Keeps track of documents flowing in and out of electronic data processing division.

Since great volume or complexity is one of the requisites to making EDP feasible, employment opportunities are best at present in metropolitan areas where government agencies and large businesses are located. Insurance companies, public utilities, wholesale and retail establishments, and manufacturing firms were among the early users of EDP. Service bureaus, operated by manufacturers or entrepreneurs, will make computer facilities available to smaller businesses in both metropolitan and smaller cities as the computer industry expands.

The following table is adapted from nation-wide weekly salary data for all jobs reported in the June 1966 issue of *Business Automation*.[3]

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[3] *Business Automation* is published by Business Publications International, Division of OA Business Publications, Inc., 288 Park Ave. West, Elmhurst, Illinois 60126. Survey conducted for them by Chicago firm of Philip H. Weber and Associates, Inc.

| *Job Title* | *Midpoint of Nation-Wide Weekly Actual Salaries (1965-66)* |
|---|---|
| Manager of All Data Processing | $334 |
| Manager of Data Processing | 308 |
| Manager of Systems Analysis | 306 |
| Lead Systems Analyst | 259 |
| Systems Analyst A | 200 |
| Systems Analyst B | 173 |
| Systems Analyst C | 147 |
| | |
| Manager of Programing | 247 |
| Lead Programer | 229 |
| Senior Programer | 211 |
| Programer A | 179 |
| Programer B | 151 |
| Programer C | 140 |
| | |
| Manager of Computer Operations | 195 |
| Lead Computer Operator | 180 |
| Senior Computer Operator | 152 |
| Computer Operator A | 126 |
| Computer Operator B | 119 |
| Computer Operator C | 101 |
| | |
| Supervisor Auxiliary Equipment Operations | |
| High Speed Printer Operator | 127 |
| Magnetic Tape Librarian | 118 |
| Coder | 99 |
| Data Examination Clerk | 108 |
| | |
| Tabulating Supervisor | 175 |
| Tab. Machine Operator-Group Leader | 149 |
| Tab. Machine Operator A | 126 |
| Tab. Machine Operator B | 107 |
| Tab. Machine Operator C | 90 |
| Tab. Machine Operator-Trainee | 84 |
| | |
| Keypunch Supervisor | 148 |
| Keypunch Operator-Group Leader | 126 |
| Keypunch Operator A | 116 |
| Keypunch Operator B | 93 |
| Keypunch Operator C | 83 |
| Keypunch Operator-Trainee | 77 |

Women find ready acceptance in the electronic data processing field. They are employed as programers, service representatives, educational specialists, and systems analysts, in addition to those positions listed earlier.

A prerequisite to success in EDP is a logical mind. If you enjoy working puzzles, chances are you will do well in EDP. Necessary characteristics for top-level positions include ability to work with and through people, grasp a situation quickly, analyze objectively, think creatively, communicate well, work under pressure, organize and interpret data, and make decisions. Flexibility, patience, perseverance, ingenuity, and emotional maturity are also necessary.

Even in the clerical jobs, automation will require ability to think, a trained imagination, good judgment, plus some skill in logical methods, and some mathematical understanding.

The educational level required for positions in data processing rises from one level to the next. Since programing encompasses such a variety of levels, we might consider this the dividing line for a college degree. Opportunities above and including programing may require college preparation. Jobs below programer and supervisors of computing and tabulating operations require at least high school graduation. Technical school training is desirable. One might be cautioned about attending a technical institute in one area and then finding that job opportunities do not exist in this area.

For positions as console operator, some college instruction may be required. The federal government requires a college education or its equivalent in work experience for console operators; or persons may be able to qualify for appointment on the basis of previous experience in computer work and general aptitude as demonstrated by special tests.

Most private employers screen applicants by tests designed to measure their aptitude, especially their ability to reason logically. Beginners employed for work of this kind or transferred to it from other positions are seldom expected to have had specific training as operators. Most employers provide the necessary training after the worker is hired. The training of peripheral equipment operators may require only a few weeks; that of console operators, from two to six months longer.

As they gain experience, operating personnel may be assigned to operate more complex pieces of equipment. Eventually they may be promoted to supervisory positions.

A study made in Detroit several years ago indicates what courses employers believe prepare a person for work in the automated office. The courses are shown in the table that follows.

| *Course* | *Companies Recommending* |
|---|---|
| 3R's | 90 % |
| typewriting | 81.5 |
| bookkeeping-accounting | 22 |
| office machines | 18 |
| science | 13 |
| shorthand | 9 |
| general business courses | 4 |
| public speaking | 4 |

Since the Detroit survey was made, some high schools are offering courses in programing, key-punching, and electro-mechanical (tabulating) equipment.

To prepare for future advancement, it would be wise to include as much mathematics as possible. Some employers no longer stress a strong background in mathematics if the candidate can demonstrate a high aptitude.

At the college level, business simulation applications have created demands for persons who, in addition to a knowledge of general business operations, have adequate training in quantitative techniques such as mathematical programing, probability theory, mathematical statistics, and operations research. The term "business engineering" has come into existence.

College students might plan their work with a goal of attaining a certificate in data processing. Among requirements set up by the Data Processing Management Association are direct work experience and college courses in mathematics, managerial accounting, English, statistics, and data processing systems. It is expected that the certificate for a certified data processor will be comparable to the certificate for a certified public accountant.

# 8

# The Importance of Records Management

## 1. Records Management—A Must

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In today's economy everything from the operation of a creamery to a political campaign requires an office, a center of communication, a hub of recordkeeping and the know-how of records management. In days of yore, the women who sat at their spinning wheels in their cabin homes, those who dipped the candles for light, those who sewed the clothing their families wore, those who stood over a washboard, and those who heated their irons on woodburning stoves provided the needs of their families through the only available means. To the granddaughters of these women, the industrial revolution and the coming of the electronic age have brought with them a lessening of the need of the special skills required of the pioneer women. The kind of manufacturing done in the home in pioneer times has been taken over by the manufacturing plants of America. The availability and popularity of "store clothes," freezers, automatic washing machines, dryers, and dishwashers have revolutionized our pattern of home life. Similarly, office operations and the equipment with which to handle them have changed materially.

We are a long way from the green office visor, the bookkeeper who sat on the high stool and wrote with a quill, and the roll-top desk; but the one thing that has remained relatively constant has been management needs for files. Now more than ever before the management of records has become a most important office function. Written communications have become the nerve center of the well-managed, progressive, and profitable organizations. It is no longer possible for the untrained individual to fill satisfactorily the requirements of the well organized, smooth operation of the necessary office files in today's business.

File clerks who formerly had the full responsibility for the filing and finding of office records have now been replaced with records management supervisors or office librarians, with salaries commensurate with the job requirements. It is the responsibility of these office employees to save valuable executive time. If a $15,000 a year executive waits 12 minutes each day during a "treasure hunt" for a filed record, in a year that company will have wasted $850 of the salary paid to him! No organization today can afford such cost factors and operate a progressive enterprise. Therefore, it becomes necessary for every company first to analyze its records and then proceed to establish records management standards with competent help to provide the memory of business, the filed records.

Management requires files about products, personnel, financial information, and customers; and when called for, they need them promptly to speed the work of the busy executive. In order to accomplish this, it is first important to select the right person for the job, one who is interested in working with records, one who has been trained on filing rules and filing systems, is aware of the various types of filing equipment and supplies available in today's market, and is capable of determining the right system as well as the right equipment for the material to be filed. That person must also be capable of analyzing records to establish not only the filing system but the destruction schedule, how long material should be kept in active files, when it should be transferred to inactive, when it should be destroyed, and what should be microfilmed. It has been estimated that the average four-drawer file cabinet in a filing department costs approximately $3100 a year. Included in this figure are clerical salaries, office space, filing supplies, and the cost of the cabinet. On this basis, we can readily understand the importance of records management in the office, which has to do with all phases of business records including creation, protection, storage, and disposition.

In planning the filing system for any organization, the following factors must be taken into consideration:

1. The kinds of records to be filed
2. How the records will be requested and used
3. How the records will be stored
4. How long the records will be retained.

Once this has been analyzed, it is necessary to determine and standardize the following essential needs of any efficient filing department:

1. Find the best system for the records to be filed—*alphabetic, geographic, subject, or numeric.*
2. Choose the correct housing; fit the file to the system, not the system to the file. If space is a factor, and we should always consider the cost of space in determining equipment, bear in mind that a five-drawer file takes as much floor space as a one-drawer file, and a six-drawer (Kompact) file takes the same amount of space as a five-drawer file. And now, shelf filing has become the modern, low cost, high capacity filing technique. Shelf filing is 50 percent faster than drawer files in both filing and retrieval of records; shelf filing requires up to 62 percent less floor space; shelf filing is up to 70 percent less expensive! You will also want to analyze what mechanized filing can do for you as a time-saver. Recognize that some records require safe keeping, in which case insulated filing equipment should be used.
3. Select the proper filing supplies in terms of folders, guides, and labels according to the system installed.
4. Control of files is essential to guarantee accurate operation. Establish a charge-out system for any records removed from the files. Use a charge-out guide, folder, or substitution card. This will show that the record is being used, has not been lost; it will enable the file worker to follow up for the return of the records to the files. Refiling becomes simple when the records are returned to the files to replace the charge-out card or guide.
5. Every office needs a follow-up system on items that must be handled on a due date. Decide on, first, the responsibility for follow-up, the individual who will require the material, or the file department. The latter will be found to be preferable, and then the means of follow-up must become standard—the follow file sticker, the visible tip folder, or the tickler file.
6. Filing control through cross-reference must not be overlooked. Some business papers may be filed in any of several different ways. Through the use of cross-reference sheets, you will be directed to the folder in which the material is actually filed.

Your filing system has now been established, and the next step is the determination of retention, transfer, and microfilming. To determine this, your filing material should be classified into four groups:

1. Vital papers, which are essential to the continuation of your business, those that cannot be replaced and should never be transferred or destroyed.

2. Important papers, which are required but could be replaced at considerable cost and delay. These could be transferred.
3. Useful papers, which are temporarily helpful, can be replaced at slight cost and, hence, could be destroyed after a few years.
4. Nonessential records, which may be destroyed.

For material to be transferred, determine whether to follow periodic or perpetual transferring. Keep in mind government regulations for the retention of certain records. In the interest of saving space, microfilming of records should be considered. Having developed a standardized filing system to be operated with competent, well-trained help, established filing rules must be adhered to. Your files must be checked periodically in order to maintain the standards established and to analyze the adequacy of the system and supplies in use as the company grows and as the vital papers essential to its operation increase in quantity. Speed and accuracy represent the essence of an efficient filing system controlled through your records management department. Without efficiency in your filing department, you cannot run a profitable business. In short, the absolute measure of corporate efficiency depends upon how you handle the vital papers of your business.

Management needs total information; it needs facts and needs them fast. These must come from the filing department. The true tests are: Can you get a record from your files in one minute? Is the data complete and in one location when you get information from your files? Have you established a standard retention plan for active records and a destruction plan for inactive records? Is there record protection for vital records? Above all, does each member of your organization understand the standards of operation in your filing department? Has your records management department established your system to handle tomorrow's needs? If you can honestly say "Yes" to each of these questions, you have established the Utopian operation for your company. You will dominate the market. Your company will have freed its busy executives for top management duties without unnecessary delay and interference.

# 9

# Administering Cooperative Programs

## 1. Effective Cooperative Business Education Programs

**RALPH E. MASON**, Indiana State University, Terre Haute

A new coordinator needs a base upon which to start a successful cooperative office education program. The efficiency with which a coordinator organizes his activities is the significant factor determining his ability to perform with competence and dispatch. He needs to (a) determine the objectives of his local program, (b) evaluate the community resources and school resources available to him with proper cultivation, then (c) set out to operate a plan which will reach these objectives. To do this, a coordinator needs a frame of reference.

Recently, while considering possibilities for a frame of reference for action by coordinators, it was decided to build a framework by developing a plan for a coordinator's file of minimum essentials and an individual student-learner's file of minimum essentials. The concept of "file of minimum essentials" suggests a base upon which a new coordinator may start a successful program, if it is recognized that he must expand and develop the file, changing it to fit the needs of a local program, keeping it dynamic and effective. An experienced coordinator might organize the materials and plans already in his possession within this framework. In arriving at a list of minimum essential items to include in the files, the revised *Illinois Bulletin for Organizing and Administering Cooperative Part-Time Programs in Business Education* was consulted and teacher-coordinators and supervisors of business education were asked for advice. The resulting coordinator's file is suggested here:

### COORDINATOR'S FILE

1. A statement of objectives for the local office occupations program

2. Criteria for the selection of student-learners
3. Criteria for selection of training stations
4. Basic or general instruction outline
5. Current lesson plans
6. Club activities
7. Advisory committee membership and reference material
   a. Professional organization information
   b. Foundation offerings
   c. Scholarships and awards available
   d. Sponsor development plans
8. Supplementary teaching aids and resource materials
9. Copies of monthly coordination report
10. Program development plans.

Cooperative business education thrives on the individual originality of the local teacher-coordinator. With a few suggestions as guides, each coordinator needs to tailor his own plans for his own program. No doubt a short explanation of certain items to be included in the files would be appropriate at this point. Let us consider the coordinator's file.

*Statement of Objectives.* Direction for initiating a new program and building it over the years comes from a specific set of objectives, thought out carefully by a coordinator, his advisory committee, and the school administration. A statement of these objectives should be on file. As a case in point, one might consider the aims and objectives of an office occupations program to be:

1. To aid student-learners in developing office skills and job intelligence applicable to all office occupations through correlated classroom instruction and on-the-job training.
2. To develop the specialized office skills and knowledges needed by student-learners required for successful employment in the business organizations where they are placed
3. To provide supervised step-by-step laboratory work in the form of a real job situation in the local business community
4. To provide preparation that will enable graduates to grow and progress in the office occupations
5. To contribute to the general education objectives of the school.

*Criteria for Selection of Student-Learners.* Each teacher-coordinator should develop criteria which will be compatible with his school's administrative policies and the best interests of his prospective student-learners. The criteria he develops should be made specific and should include, among other things, the following:

1. The student must be 16 years of age by the time of station placement

2. The student must be employable from the standpoint of the necessary skills, personality traits, health, and school achievement to indicate the probability of success in his entry position
3. The student must have the potential for representing the local school well in the business community
4. The student must indicate an interest in and an aptitude for studying the course content offered in related instruction after proper orientation
5. The student's parents must understand the objectives of the cooperative program and consent to cooperate in his successful participation in all phases of the program.

*Criteria for Selection of Training Stations.* Training stations will be upgraded as coordinators select them more carefully according to criteria determined by taking into consideration his local business community and the quality and objectives of his cooperative education students. Here, again, criteria should be developed to fit the local program. These criteria should include, among other things, the following:

1. The prospective training station must be a reputable and successful business
2. The job placement must conform to state and federal Child Labor Laws applicable to the particular age group
3. There must be an opportunity for a variety of duties and responsibilities commensurate with the abilities and objectives of the student-learner
4. The employer must be willing to pay the student-learner at a rate comparable to other beginning employees having similar duties and responsibilities
5. There must be assurance of an average of a minimum of 15 hours a week on the job during the school term.
6. A job supervisor must be designated who is capable, interested, and permitted to give the student-learner individual on-the-job direction and instruction.

*Basic or General Instruction Outline.* An outline should be developed before the opening of the school year for the course content to be presented to all the class members covering elements of knowledge and skills common to job intelligence and basic understandings in all of the business occupations. Available course outlines and textbooks can furnish excellent references for the development of this outline.

*Current Lesson Plans.* Weekly lesson plans should be set down by each teacher-coordinator in at least basic outline form. Changes occur so frequently in cooperative education that plans need reviewing each year.

*Club Activities.* Participation in local, state, and national club activities develops leadership. A club constitution, a calendar of club events, and projects should be developed and reviewed each year by the teacher-coordinator and the executive committee of the club.

*Advisory Committee Membership and Reference Materials.* Although an advisory committee is not mandatory, most successful programs organize one and make use of its helpful suggestions. A coordinator should prepare specific plans for all advisory committee meetings.

*Supplementary Teaching Aids and Resource Materials.* A coordinator should maintain contact with recent economic and business developments in the local, state, and national business communities. He should read his professional magazines such as the NATIONAL BUSINESS EDUCATION QUARTERLY, BUSINESS EDUCATION FORUM, *Journal of Business Education, Business Education World, American Vocational Journal, NEA Journal, Balance Sheet,* and *Business Teacher.* He should also read magazines such as *Fortune, Business Week, Office Executive,* and *Today's Secretary.* By so doing, he can be on the alert for supplementary teaching aids and resource materials. His resourcefulness is inspiring to his student-learners and to his cooperating businessmen.

*Copies of Monthly Coordination Report.* The monthly coordination report required by many State Boards of Vocational Education, if conscientiously prepared, becomes a valuable record for the coordinator and his administrators.

*Program Development Plans.* Expansion and development of a local cooperative education program will include supervisory instruction (individual and group session), curriculum revision, and adult education.

A list of minimum essential items to include in the individual student-learner's file is suggested here:

### INDIVIDUAL STUDENT-LEARNER'S FILE
*(One or more file folders)*

1. Student-learner application to enter program
2. Letters of recommendation or qualification forms
3. Personal data on student:
   a. Test scores
   b. Other guidance data
4. Training station memorandum or agreement, including at least a one-page step-by-step training plan and a one-page sheet showing specific instruction requirements and projects
5. Student-learner's weekly job report
6. Grade sheets or rating sheets
7. Student-learner's plans for growth and development
   a. Extra readings
   b. Individual projects
   c. Club activities
   d. Special responsibilities

The individual student-learner's file should contain all those items of information the coordinator gathers or develops to facilitate the proper selection, placement, and preparation of the student. These items would include, among other things, all forms prepared by the student, employer, teacher-coordinator, or other faculty members having to do with the student's entrance into and success in the cooperative education program.

The training station memorandum or agreement, which includes at least a one-page, step-by-step training plan and a one-page list of individual projects and references, becomes an important part of this file.[1] There are so many good forms of the training station memorandum available that time and space will not be consumed here in discussing them. The step-by-step training plan indicates what is to be learned, and whether it is to be taught in the classroom or at the training station. It is derived from a realistic analysis of the tasks, duties, and responsibilities of the student-learner in his part-time office occupation, and is developed jointly by the teacher-coordinator, the training station sponsor, and perhaps the assistance of the student-learner. A training station should not be accepted by a coordinator until the area of experience and training have been established to his satisfaction with the manager or job training sponsor. This could be done on the first or second visit to a prospective training station by the teacher-coordinator prior to placing a student-learner with the business. The establishment of these areas and the development of the training plan on succeeding visits will put specificity into the teacher's coordination time. The coordinator should involve the student-learner and the job training sponsor in the process of detailing the areas of experience and learning. This involvement during the school year will be a learning experience for both the student-learner and the job training sponsor. The adult will become a better supervisory person for the business for dealing with each new employee.

In summary, it should be re-emphasized that the contents suggested for these beginning files are minimum essentials. Communities differ, schools differ, and coordinators differ. These suggested minimums should in no way restrict the imagination or creativity of individual coordinators, but should merely serve as a framework of organization and as a departure point from which to develop and improve a program.

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[1] For a more complete discussion of the training plan and examples of plans and forms, see *Office Career Notebook* by Mason and Ohm and *Cooperative Occupational Education and Work Experience in the Curriculum* by Mason and Haines, The Interstate Printers and Publishers, Danville, Illinois.

# 2. Cooperative Work Programs for Secondary School Students

**FRANCES SMUTZ**, Amphitheater High School, Tucson, Arizona

How different the high schools of the near future might be if more administrators, counselors, school boards, teachers, and business and professional people should suddenly decide to explore the possibilities of the community as a school laboratory! How delighted students would be with the opportunity of being released part time, as they proved worthy, from classrooms to the reality of business and industry.

Most teachers have observed the personality growth and poise which result when students are given even nonremunerative task assignments about school. Many students benefit from leaving a regular class to work in the office collecting attendance slips, carrying messages, and doing simple clerical work. The film crew and the stage crew perform responsible services and enjoy a certain prestige. Other students like to typewrite for teachers or assist them in other ways, to sell and take tickets, or usher at school programs. Young people want a chance to take responsibility. Unlike conditions in the past when many of us grew up in rural areas with an abundance of chores to be done, urban living of the present is such that many young people, through no fault of their own, have not experienced the discipline which results from work which must be done. Work experience programs can help fill this need.

Various types of work experience programs have been tried in American schools. Some conduct an exploratory program in which students are placed as observers or student learners in business and professional offices offering possible careers. Some schools, in an attempt to be of service to the many who drop out early in high school, are guiding them into part-time, out-of-school work which they may possibly pursue on a full-time basis when they do leave school. Such work is usually unskilled and easily learned, and there is no attempt to coordinate it with school classes. Other schools offer unsupervised work experience programs with remuneration for students in a wide variety of jobs but with no correlation between in-school study and the job. Many of these work plans have certain values, but the plan which is most promising is the cooperative occupational training program, which is really a learning experience with a career objective rather than a work experience program only.

### What Is the Program?

Cooperative occupational training is a plan which correlates actual work experience in the community with classroom instruction under the supervision of a coordinator or teacher-coordinator who is occupationally competent. The community and the school cooperate to give occupational instruction to students who want it, need it, and can profit by it. Many of these programs, by meeting certain conditions, may receive reimbursements from state and federal vocational funds. A minimum of one hour a day of directly related instruction is given in school; at least 15 hours a week are spent in on-the-job experience. Cooperative programs may be in distributive education, in office or business occupations, in trade and industrial occupations, or in diversified occupations of a type which require training. Students receive remuneration, usually on a par with other employees of the cooperating business, and also receive school credits for the work experience.

### Why Have the Program?

The primary purpose of cooperative occupational training is to serve the occupational needs and introduce the high school student, usually in his senior year, to the world of work in the field of his career objective. Such training bridges the gap between school life and occupational competency. It makes school work significant; it helps young people to correct personal problems. More trained manpower and skilled workers are needed with each passing year. Training for basic competency in specific occupations which are related to the abilities and interests of youth is the contribution of cooperative occupational training programs.

### What Value Does the Program Have?

Cooperative occupational training is of value to the youth involved, to the school, to the employer, and to the community. The student receives experience in line with his interests, his abilities, and his occupational needs. He develops not only necessary skills but attitudes and habits of responsibility. He gains in social and economic status. He sees the relationship between school work and career; he learns to give attention to such details as a neat appearance, legible handwriting, accuracy in figures, and to take pride in good work. He earns as he learns at hours and under conditions which are legal and considerate of his welfare. He has help in analyzing his problems and gains in the ability to get along with adults.

Cooperative occupational training permits the school to use the facilities of the cooperating businesses for a broader curriculum and greater advantages for students. By using the equipment of the community as a laboratory, the school can better adjust the curriculum and classroom instruction to meet the needs of the modern world. Such a program promotes good public relations; a spirit of cooperation in solving problems develops between the school and the community. Young people are encouraged to remain in school, and parents are interested in a school which promotes such a program. For the employer, cooperative occupational training means a source of workers—workers with enthusiasm and interest which come from discussion and consideration of problems in classes guided by competent teachers. They are often able to retain these trained, part-time workers as employees after graduation. They find that trainees learn readily with instruction both on the job and in school. Many employers feel a real satisfaction in thus cooperating with the school and helping with the problems of youth.

The community profits from cooperative occupational programs. The young persons in the cooperative programs often remain in their home community and enrich it with their skills and high ideals of service. Then, too, there are fewer untrained youths who drop out of school because of lack of interest or for financial reasons. The partnership between school and business and industry made possible by cooperative occupational training produces secure and valuable citizens.

## 3. Selecting Work Stations for Cooperative Part-Time Students

**PEARL T. RAINES**, Troup High School, LaGrange, Georgia

The student's choice to participate in a cooperative work program is indicative of his desire for purposeful learning. The aim of the student is to use this learning to secure worthwhile employment when he completes high school. A cooperative work student has the firm conviction that participation in this type of program will equip him with the skills necessary for success in business or industry. The coordinator of a cooperative work program has not only the privilege but also the responsibility of selecting the work station for the part-time student trainee. The fulfillment of the objectives of the student and the coordinator rests upon the selection of a satisfactory training station. What guides can the coordinator use in selecting the best available work station for each trainee? It seems obvious that the coordinator must develop criteria to help in making such an important decision. The following suggestions should be helpful to a coordinator in selecting work stations for cooperative part-time students.

### Type of Business

The business or industry selected for the work station should be one that will make the maximum contribution to the development of skills needed by the student. The business should be engaged in the type of activity that the trainee wants to learn. The business should be of the type that has general community acceptance, and the integrity and reputation of the business should be of the highest type.

*Personnel Policies.* What type of person is presently employed by the business? Does the employer check with all former employers before hiring an employee? Are all references contacted for pertinent information regarding the prospective employee? Does the employer conduct a personal interview with potential employees? Does the businessman desire so strongly to maintain public acceptance for his business that he exercises the utmost judgment in the selection of all personnel? These are some of the questions a coordinator should try to answer about the personnel policies of a business before accepting it as a training station.

*Working Conditions.* Working conditions of the business should encourage the student to develop good habits and behavior. High school youth should not be placed in any business firm where the working conditions and environment would be detrimental to their welfare and progress. The establishment should maintain satisfactory lighting, ventilation, safety factors, and working hours.

*Training Facilities.* Does the training agency in which the student is to be placed have adequate equipment to afford all-round training? The student should have access to equipment that will enable him to learn skills that will provide opportunity for employment. Equipment in the business office should be operational and relatively up to date.

*Location.* The proximity of work stations to the school is an important factor because of the transportation problems that students face. If possible, a public conveyance should serve the school and the work station. The lack of readily available transportation facilities should not exclude an excellent employer from participating in the program, however. In such cases, private transportation may be arranged by the student, and the employer may even share in the transportation costs.

*Technological Changes.* In the past, cooperative work programs have emphasized rather specific job skills. Modern technological developments are bringing about radical changes in occupational demands and requirements. It seems rather evident that certain workers will be replaced by a changing technology, and new jobs and positions will be created. Since many workers will have to change types of jobs several times during their working years, it becomes increasingly important that the trainee develop the personal qualities that are essential for adaptability, for working with highly complex machines, and for successful human relations involving the employer and fellow employees. Because of this changing technology, the business selected as a work station should help the high school student develop sufficient mastery of one or more specific skills to enable him to obtain full-time employment.

### Employer Relationships

In small work stations, it is probable that the employer and the supervisor of the trainee will be the same person. In larger work stations, it is more likely that the person who supervises the training program will be someone other than the employer. If the work is supervised by a person other than the employer, that person should possess the same qualifications as those expected of an employer.

*Personality Factors.* One of the first steps in working with an employer is to recognize the specific quality or qualities in his personality that will give him strength in working with a student. The employer should be the type of person from whose association students derive values, ideals, and perspective needed for a rich and wholesome life. He should have a sincere interest in the welfare of young people and should be enthusiastic, courteous, and well groomed. He should be able to establish rapport with others. He should be friendly but firm and positive in his approach to the trainee.

*Leadership Qualities.* The employer should appreciate the worth and dignity of all individuals. He should be sensitive to individual differences among his employees and should recognize that people who are affected by decisions should understand the reasons for them. The employer should be able to get the trainee to accept the responsibility for his own learning. He should be able to help plan a program to build upon the trainee's strengths and help him eliminate his weaknesses.

*Understanding Program Objectives.* The employer should understand that cooperative education is a method of education that integrates learning experiences in the school with those the trainee receives in his place of employment. He should be completely sold on the idea that he has joined forces with the school in assuming the responsibility for training the part-time student so that he will develop occupational competence. His goal should be to provide experiences that will enable the trainee to become a fully qualified worker in his chosen field.

### The Work Program

The growth of our economy indicates that more and better workers will be needed in the future. Valuable as school training for a particular job is, actual experience on the job sometimes is the only way to develop the necessary competence. Cooperative work programs are designed to bridge the gap between the school and the business community. In this type of program, the student gains a first-hand knowledge of how business operates.

*On-the-Job Training Plan.* The coordinator and the employer should plan together the job experiences to be included in the laboratory training. These experiences should provide a well-rounded background in a particular field. The student also should be able to advance to a higher phase of training when he has mastered the necessary skills and the employer and coordinator feel that he is ready. This training plan should include large units embodying written objectives and small units for day-to-day activities.

*Direction of On-the-Job Training.* Does the employer have a sincere interest in the training of the student? Is the attitude of other employees favorable toward the program? Do the employer and other personnel have an appreciation of the value of technical training as it relates to the job? Unless these questions can be answered in the affirmative, the program has little chance for success. If the employer cannot accept the training of the part-time student as an important responsibility, and not just as an opportunity to get part-time help, he should not participate in the program. The employer should be interested in helping the trainee develop into the type of employee who can meet the standards of any business. The men and women employed by the business should be skilled in their occupations and should display pride in a job well done. They should understand their responsibility to young people and should have a willingness to impart knowledge to them. The person who is immediately responsible for the training of the student should possess a general understanding of the skills required to perform the duties of the job. He should be aware of the demands made by other businesses for this particular job and should strive to provide quality instruction.

*Standard of Performance.* Because individuals vary in ability and in the development of skills, standards of performance must be kept flexible. The employer should be able to determine the quality of work which the trainee is capable of doing. He should then be expected to help the trainee perform to his maximum ability. As the student becomes more proficient, the standard of performance should be raised. The employer should help the trainee learn what is expected of him at each level of training and should stand ready to give assistance when it is needed.

*Length of Program.* The coordinator searches out that business which can provide at least the minimum working hours for the trainee. It is recommended that at least three hours a day, or 15 hours a week, be the minimum training time. In most cases, the coordinator attempts to place the student at only one work station for the entire year. Some advantages of a full year of training at one station are (a) depth of training, (b) better adjustment to job requirements, (c) increased efficiency and production, and (d) greater usefulness to the employer.

*Compensation for Services.* The pay that the trainee receives should be comparable to that received by other student trainees in the area. There are certain federal regulations governing the employment of student trainees by firms engaged in interstate commerce. The coordinator should check these regulations to determine whether or not they apply to the particular business under consideration as a training station.

### Evaluation of Work Program

The ultimate objective of the cooperative work program is to provide training opportunities for the youth of the community on a level that will reflect credit on the business community, school authorities, parents, and the students. For a program to be successful, evaluative criteria should be developed that will measure the effectiveness of the coordinator, the employer, and the student in the work program. The evaluation instrument should promote improvement and progress on the part of all concerned in the program. The task confronting business education today is not merely one of meeting today's need. It is essentially one of developing an educational program that will also meet the needs of tomorrow, of next year, and of the next 20 years. Teachers, administrators, and boards of education cannot successfully blueprint a plan for cooperative education 20 years ahead, but they can and must constantly project plans for a program that will be different and will be constantly changing. They can be sensitive to the changes that are taking place—employment trends, changes in business organization, automation in business, changes in population, and changes in patterns of living. As such changes occur, appropriate adjustments must be made in the cooperative work programs of our high school.

## 4. The Relationship of the Clerical Program to Business

**MILDRED ANDRA WITTEN,** Arlington County Schools, Arlington, Virginia

The clerical program, by its very nature, must be flexible, adaptable, and constantly changing. As business procedures and methods are changed and revised, so must the clerical program be changed and revised. This places the clerical teacher in a key position in the total business education program, both in terms of utilization of community resources and in the development of a functional program.

### Justification for Clerical Practice

"It is true that an increasing percentage of our clerical office workers are coming from high school graduates and that colleges and universities are not planning and do not plan to contribute to this labor force." [1] Many business organizations are conducting educational programs within their own organizations because of the acute need for adequately prepared clerical workers. In many instances, this is for employees who are to be upgraded, but in other instances employees are given initial skill instruction. This presents an educational challenge which business educators cannot ignore.

Relationships with the business community must be established and maintained if business education is to perform its proper function in preparing students for occupational competence. Business education, generally speaking, has been reluctant to interpret its program to business, industry, and other educators. Developing means of conveying the purposes, problems, and needs for the preparation provided in business education must become a major concern for every business educator. Business educators must seek and receive counsel from business and agencies that can help in the program.

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[1] Collins, L. M. "The Clerical Worker of the Future." *The Clerical Program in Business Education.* The American Business Education Yearbook, Volume 16. Somerville, New Jersey: Somerset Press, 1959. p. 84.

A clerical program cannot operate effectively if the education exists on split levels. Split-level instruction exists in clerical preparation as long as the program is not based on current, up-to-date procedures and practices of the business community. A little effort on the part of the school and business can eliminate the existence of split-level clerical instruction. A cooperative effort, then, must be considered if a split level in theory and actual practice is to be avoided.

The graduate is the only connecting link between many schools and business in the community. In far too many instances, the graduate is left to take the gigantic steps from school to employment alone—leaving the school's reassuring familiarity to assume a position in a world he has known only through textbooks or an occasional field trip.

Business education should assume the responsibility for establishing lines of communication to make this transition an easier one. There is much more to be done, and it must be done with the support of all business educators. Business education cannot hold fast to traditional patterns of education and resist changes which are inevitable in business.

The clerical program is demanding the best that business education has to offer. If there is conflict in ideologies within business education concerning its functions, steps should be taken to eliminate another split level. The clerical program is a positive step toward a more functional program and should receive the cooperation of every business teacher. Cooperation, like charity, should begin at home. It is well to remember that business education can cooperate with business and industry only when cooperation exists "within the party."

The teacher in a clerical program must know the changes occurring in offices due to automation, know the standards of performance in various tasks, and understand procedures followed in gathering and processing information within the office. This cannot be accomplished adequately by just reading current literature. Neither can it be accomplished through an occasional field trip. In fact, it is difficult for the teacher who has a full teaching schedule to maintain contacts unless some planned program is followed.

Work-experience programs, through coordinators, provide an organized program for helping to establish and to maintain contact with the business community. The effect of a program which provides daily contact with the business community merits careful consideration.

### Communication with Business

There are innumerable benefits to be derived from having a representative from the educational program in constant communication with the business community. While other methods have been used, the personal conference between coordinator and businessman lends itself to exchanging ideas in an effective way. It is also possible to interview employees and employers of different types of business. The instructional program is strengthened by job analyses made in actual offices when the findings of this type of research are converted into classroom instruction. The coordinator also can evaluate the business education program by a follow-up of the high school graduates.

The development of work-experience programs offers an approach to the problem of establishing lines of communication and goes beyond a mere exchange of ideas. This is a program which permits facts and trends to be translated into action.

### Other Resources

The work-experience program is not the only approach which may be followed, but it is tapping one resource that many business education programs have not utilized. There is a tendency to feel that the community's resources have been fully utilized when a field trip is conducted, when a businessman is invited to speak to a class, when business forms are secured, or when an exhibit is placed in a local business establishment. To be sure, these are valuable, but may follow somewhat a "hit and miss" pattern. One businessman described a similar situation as merely applying a few "band-aids."

Perhaps the greatest resource, yet untapped, is that of the businessman's know-how. This is a know-how of business operation and effective office procedures. All too often, teachers are forced to assume a defensive position when the only know-how expressed by the business community is that of knowing how poorly students spell, read, or write.

Through cooperative work-experience programs, the business community assists in the education of young people. Assisting in the actual education of young people develops a type of rapport with the business community which may not exist otherwise.

Perhaps, more than any other area of business education, preparing students to perform clerical tasks is left too much to chance. There are fairly specific standards by which institutional programs for stenographers, typists, and bookkeepers may be evaluated. The duties of clerical workers vary so widely that it is difficult to evaluate in terms of standards of performance. A cooperative evaluation made by school and business is of utmost importance to this area of preparation.

### Establishing Lines of Communication

The clerical teacher can initiate community contacts through a variety of activities. While a cooperative work-experience program lends itself readily to making community contacts, the teacher can establish lines of communication in situations where a work-experience program is not feasible.

Participation in civic club programs is an excellent way to present the training program. Most civic organizations have education committees with which the clerical teacher can meet and discuss the school's program and objectives. The existence of a Future Business Leaders of America chapter is another means of interpreting business programs to the community. The activities of the chapter could include public information, demonstrative programs, surveys, and other types of activities. In many instances, businessmen become interested in work-experience programs through personal participation in club activities.

A clerical program should have an advisory council or committee composed of school administrators, businessmen, and teachers. An occasional meeting which is well planned and executed can be of tremendous help in planning instructional programs, correcting weaknesses, and providing up-to-date course content. A meeting which is not well planned can have an adverse effect.

Planning a conference which can be of mutual help involves careful selection of committee members, advance notice of time and place of meeting, careful selection of program participants, and a moderator who can preside democratically and effectively. A conference, or conferences, with committees can be a two-way exchange in which mutual problems and needs can be discussed.

### Business Education Contributes to Business

Thus far, the discussion has centered primarily around the assistance business can provide the school. However, business education must not overlook its contribution to business. Needless to say, students enrolled in a course or program in which the teacher is well informed as to the current trends in business can become more valuable employees. There are improvements in skills the teacher can emphasize which, in effect, can upgrade the level of job performance. Businessmen are cost conscious and are interested in reducing the cost of the total business operation. Time can be saved in the orientation of a beginning employee if he has had a trial work period under guidance before making the adjustment to the actual job situation.

### Automation

One of the areas of business education needing attention is that of a realistic appraisal of the effect of automation on educational programs. Such an appraisal may very well challenge business education and the ingenuity of every business teacher to so instruct that the students will be equipped to meet modern-day office situations with confidence. This appraisal is needed on the community level in addition to the research already in progress

"Despite the swing to more and more automation in the office, there seems little prospect that great numbers of works will be thrown out of jobs. Up to now, the trend has been in the opposite direction. As machines have taken over boring and tedious paper work, office employees have been upgraded to other, more interesting jobs . . . Even with the new mechanical aids, clerical tasks continue to increase." [2]

This type of information has tremendous implications for business educators and more particularly the clerical practice teacher. It is in the clerical or office practice class where procedures and office routine must be considered and students prepared to adapt to changing conditions.

The clerical teacher recognizes the importance of studying the effects of automation on the instructional program. Although basic skills may have been developed previously, the teacher may need to emphasize various applications of skills to numerous activities. It is also of major concern to the clerical teacher to acquaint students with terminology and develop an understanding of the systems used in processing and recording data. The clerical program affords the teacher an opportunity to give remedial instruction and to emphasize the importance of accuracy in all activities.

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[2] "Revolution in Office Work." *U. S. News and World Report* 46: 66; May 4, 1959.

### In Conclusion

All secondary business education programs need to provide general clerical instruction. In this sense, all business teachers are general clerical teachers. The size of the school and the business education program in existence will largely determine the nature of the clerical practice offerings. Perhaps the most important factor is not how and where clerical skills can be taught, but that provisions be made for teaching them within the framework of the total business education program.

The cooperative work-experience program greatly facilitates two considerations of clerical instruction: (a) continuous contact with the business community through a coordinator whose work schedule provides time for such activities, and, (b) a class in which previously acquired skills can be fused, supplemented by additional skills, and then applied to actual office activities. The well-organized cooperative work-experience program would also involve advisory committees, surveys and follow-up studies of graduates, job analyses, club work, and public relations activities to eliminate a split-level situation between the school program and the business community.

Even though some schools cannot provide for cooperative work-experience because of community size or location, provisions can be made to provide for instruction in the performance of clerical tasks. The instruction provided is limited often only by the interest and ingenuity of the teacher. In establishing an adequate program, the following four-step plan may be helpful: (a) appraise the program in terms of the present offerings and needs; (b) develop a plan for making necessary adjustments; (c) take positive steps to put the plan into operation; and (d) evaluate, follow-up, and adjust.

# 10

# The National Business Entrance Tests

## 1. What Are the National Business Entrance Tests?

The National Business Entrance Tests are achievement tests measuring marketable productivity in one or more of five basic office jobs: bookkeeping, general office clerical (including filing), machine calculation, stenography, typewriting, and business fundamentals. In all tests, an attempt is made to simulate actual working conditions in an office. The NBETest items are consistent with recognized educational objectives and can be used with any textbook. Easy administration of the tests and interpretation of the results are features of the NBETests. A brief description of the tests follows:

*Business Fundamentals and General Information Test.* This test covers general education items such as the mechanics of English, spelling, business vocabulary, and arithmetic; and nonschool-taught knowledge absorbed from radio, television, newspapers, and other sources.

*Bookkeeping Test.* The bookkeeping test includes the application of recording techniques, the preparation of statements, the locating and correcting of inaccuracies, and other common bookkeeping operations and knowledge.

*General Office Clerical Test (including filing).* This test measures facility in the skills of checking and classifying, ability to interpret and produce business forms, a knowledge of and speed in locating and filing business materials, and other similar activities.

*Machine Calculation Test.* This test is composed of samplings of computational work common to many offices to determine the facility of the examinee in handling them rapidly and accurately as well as maintaining a satisfactory, sustained pace.

*Stenography Test.* The stenography test measures the ability of the examinee to take ordinary dictation for a reasonable length of time and then to transcribe the notes promptly in a mailable form.

*Typewriting Test.* The typewriting test covers the common office jobs such as typewriting letters, filling forms, setting up statistical material, addressing envelopes, typewriting from rough drafts, and similar activities.

### Who Benefits from the Testing Program?

. . . YOU, the *Teacher.* In addition to measuring the achievement of your students, NBETests provide a basis for evaluating teaching effectiveness within your school. Through the use of the percentile table you can determine the extent to which satisfactory educational standards are being maintained.

. . . YOUR *Examinees.* The achievement of each examinee can be compared with other students in his class, his school, and examinees throughout the country. Certificates of proficiency are awarded to the students who satisfactorily pass the tests in the Official Testing Series. Certificates of superior proficiency are awarded to students who demonstrate outstanding achievement on the tests in the Official Testing Series. These certificates are recognized by hundreds of employers who give preference to their holders when selecting new employees.

. . . YOU, the *Employer.* You can determine prior to employment the marketable productivity of a prospective employee by using the NBETests. The tests also provide you with necessary data to use in selecting employees for advancement. And indirectly, by improvement in business teaching in the schools, you benefit from a roster of better prepared prospective employees. You can afford to recognize holders of the NBETest Proficiency Certificates and subsidize the program in your local school system; and, too, you can use the tests advantageously in your own personnel department.

. . . YOU, the *Supervisor* in public or private secondary school or college. You get an excellent measuring device in the percentile table. Here is the basic reason for NBETests. This table enables you to determine where strength or weakness lies in the business departments that are under your direction. Only through the NBETests percentile table can you learn if the quality of the instruction in your school is being kept at least on a par with that of your contemporary schools. NBETests are prepared by educational test experts in collaboration with office managers. The tests are administered and corrected before publication, thus providing the most valid and reliable means of evaluating your program.

. . . YOUR *School.* Administration of the tests generally promotes the upgrading of the business education program within the school system. The NBETests provide a high standard for achievement to which the curriculum must be geared if the students are to meet the qualifications demanded by business offices.

. . . And YOUR *Community.* An NBETests program in a community means that the most value is received for the educational dollar by assuring that business departments produce graduates who are adequately prepared for employment. By using national standards provided by the NBETests to judge the effectiveness of the business education program, parents can be sure their children will be able to compete successfully for jobs in business.

### Who Pays the Cost?

A variety of methods is used in financing the cost of the National Business Entrance Testing program. In many schools each student who takes the tests pays the cost; in other localities, businessmen recognizing the value of the program provide financial support. Some schools finance the program through funds set aside as a part of the guidance program or from a special fund. FBLA chapters in some high schools sponsor a money-making activity to pay for the tests. The importance of testing has been recognized by the federal government through the National Defense Education Act and related legislation, which provides funds in the general area of guidance and testing.

### How the Program Operates

There are two series of the National Business Entrance Tests—Official Testing Series and General Testing Series—each with different purposes. Careful consideration should be made of the purpose intended when ordering these tests. Although both series are similar in construction and cover essentially the same skills of achievement, there are basic differences which are explained in the succeeding paragraphs.

*Official Testing Series.* Tests in the Official Testing Series are available solely for administration at National Business Entrance Testing Centers, which could easily be your school. (Complete information about the Centers follows.) Testing Center sponsors usually administer tests in April, May, or June of each year; however, testing throughout the year is also possible.

The cost of the tests in this series includes the scoring, reporting, and consultation services; administrator's manual; prepaid delivery of tests to the Testing Center; and proficiency certificates for the students who pass the tests.

A National Business Entrance Testing Center may be established to serve one or more schools. Five examinees is minimum for establishing a Testing Center—some centers have more than 750 examinees. A form for registering your school as a Testing Center and detailed instructions for operation of the Center will be sent upon request. The simple steps to follow in the Official Testing Series program are:

1. Register your Testing Center with the Joint Committee on Tests
2. Arrange with the examinees to take the tests
3. Establish a date and administer the tests
4. Forward the tests to the official NBETests Scoring Center nearest you
5. Make presentation of awards to examinees.

Four Scoring Centers, under the supervision of outstanding business educators, are located strategically throughout the country to provide effective and prompt service. Scoring results are reported to sponsors of Testing Centers within two weeks following the administering of the tests. This permits local school administrators and business leaders to provide appropriate recognition to successful examinees before the closing of school.

*General Testing Series.* The General Testing Series is used in schools for grading purposes and in preparing students for the Official Testing Series. Business also makes use of the General Testing Series for employment and placement purposes. Correction services and proficiency certificates *are not available* with the General Testing Series. The percentile table can be used in determining the achievement level attained by the various examinees.

### What About Reliability and Validity?

National Business Entrance Tests are prepared by testing specialists and business educators. Each test is reviewed by qualified office executives; in addition, the Joint Committee on Tests employs the services of a consultant who is a nationally recognized expert in test construction and measurement. Several graduate research studies have been made relating to the tests and their effectiveness in predicting successful employment and adjustments in office occupations. Persons interested in further evaluations of the NBETests are referred to recent editions of the "Mental Measurements Yearbook" edited by Oscar K. Buros.

### Percentile Table

A percentile table with detailed instructions for its use is provided with the tests. It is possible to determine how well the examinees perform by comparing the test results of a Testing Center, a school, a class, or an individual examinee with the percentile table.

The comparative results may be used by the school administrator, the business education supervisor, and the teacher in making necessary adjustments in curriculum, teaching techniques, or other phases of the educational program. Thus, in addition to their use as a basis for determining the marketable productivity of individual examinees, the tests can be used as an overall evaluation of the business education program. Businessmen are also able to use the comparative results as a basis for employment or advancement of their office personnel.

### Growth and Trends

The NBETests program owes its origin to a group of business teachers and office managers invited to a conference in 1930 by the late Professor Frederick G. Nichols at the Harvard Graduate School of Education. The first series of tests, known as the National Clerical Ability Tests, was released in 1937. Following World War II, the program was taken over as a non-profit service project under the joint sponsorship of the National Business Education Association and the National Office Management Association. In 1947, a new series of tests was released under the title, National Business Entrance Tests. They have been revised periodically to keep them in line with current office occupations skills. The tests are currently administered under the direction of the Joint Committee on Tests, National Business Education Association. The National Business Entrance Testing program has been a co-operative project of business educators, school administrators, and office and personnel managers for more than a quarter of a century. Significant contributions have been made toward the growth and educational development of examinees in hundreds of schools and businesses throughout this and neighboring countries.

# 11

# Future Business Leaders of America

## 1. The Purposes of FBLA

The Future Business Leaders of America seek to:

1. Develop competent, aggressive business leadership.
2. Strengthen the confidence of young men and women in themselves and their work.
3. Create more interest and understanding in the intelligent choice of business occupations.
4. Encourage members in the development of individual projects and in establishing themselves in business.
5. Encourage members to improve the home and community.
6. Participate in worthy undertakings for the improvement of business and the community.
7. Develop character, train for useful citizenship, and foster patriotism.
8. Participate in co-operative effort.
9. Encourage and practice thrift.
10. Encourage improvement in scholarship and promote school loyalty.
11. Provide and encourage the development of organized recreational activities.
12. Improve and establish standards for entrance into store and office occupations.

## 2. An FBLA Chapter: What It Does To Prepare Students for Business and Office Occupations

The Nicolet chapter of the Future Business Leaders of America, No. 1512, was organized at the Nicolet High School, Milwaukee, Wisconsin, on January 21, 1957. Thirty-three members were installed at that time. The most important activity for the school year was that of encouraging many FBLAers to attend their first state convention. The attempts were successful, and 15 students participated in the convention. The fact that a Nicolet student was elected to the office of FBLA state president created much enthusiasm. The members were determined to promote FBLA more than ever the ensuing year.

The second year saw the membership expand to 50 members. The chapter got off to a fast start at the opening of school. Many activities were carried to completion. Thirty members participated in the state convention and a Nicolet student was elected state secretary. From the experience gained through the events at the state level, FBLAers set even higher goals for the next year.

In the year 1958-59, the membership grew to 63 members. The students saw a need at this point to tell the FBLA story to surrounding schools and were successful in installing three new FBLA chapters. When convention time came again, a group of 40 students attended. The hard work of the chapter members seemed to pay off, as Nicolet received seven awards plus the honor of a state office.

The membership for the fourth year broke all records by showing a total of 81 members. The activities seemed to increase in number also. With a larger enrollment in the chapter, it was possible for a greater variety of service, social, and educational projects to be carried out.

In the year 1960-61, a total of 79 students participated in the activities of FBLA. A growing interest in the state convention encouraged 46 members to attend. Probably the happiest moment of the convention was the announcement that Nicolet had won the top award for its activities report.

During the succeeding years, all members have worked hard to maintain the high standards already established by previous Nicolet FBLAers. The chapter has always tried to carry out the purposes of the Future Business Leaders of America and has entered all types of activities and events at the state and national levels.

## Chapter Activities

Several months in advance of the 1963 Wisconsin FBLA convention, Nicolet students were informed that the state meeting would be held in April and that preparation should begin immediately. The sponsor stressed the importance of having many members participating in all convention events. She also encouraged all of the members to attend.

Work on the various events began during the month of January. Fifteen students worked on parliamentary procedure and another 15 students concentrated on spelling lists. A committee selected two top senior boys and three top senior girls to enter the Mr. and Miss FBLA event at the local level. Three businessmen were invited to interview the students and select the final candidates to represent Nicolet. Speeches were written by five members, four students worked on a campaign to promote Nicolet students for the state offices of secretary and president, and 10 FBLAers worked on the exhibit. Nearly every member in the chapter was involved in one or more activities in preparation for the convention.

During the month of February preliminary events were held for all the events at the local level. All these winners used the month preceding the convention to put the finishing touches on the particular event.

It was also during the month of February that the Nicolet Chapter received some wonderful news regarding the unique project they were pursuing. On February 26, 1963, the Nicolet FBLA Chapter received a letter stating that the group had become foster parents of a 14-year-old girl from Hong Kong. Her name is Mei Kam Li. The members of the chapter lost no time in announcing the news, and excitement over the project mounted. The FBLA members selected a 14-year-old girl because they felt they would gain much more by corresponding with her than they would by receiving reports from the family of a small child.

### *Nicolet Enters All-Events at State Level*

The big weekend of the state convention, April 6-7, arrived and 35 Nicolet students went to the American Baptist Assembly grounds in Green Lake to join the other 450 FBLAers. Nicolet participated in all of the convention events. It was a real thrill for the Nicolet delegation to see one of their own members handle the many duties required of a state secretary.

Much enthusiasm reigned as the results of the convention events were announced. The hard work in the campaigns for a state officer paid off as Nicolet's candidate for state secretary was again elected.

Nicolet placed first in their unique project of adopting a child from Hong Kong, and first for building more new FBLA chapters in the State of Wisconsin than any other chapter. Ever since the award for installing the greatest number of chapters has been presented as a national project, Nicolet has placed first in Wisconsin. Second place honors went to Nicolet for their parliamentary procedure team and for the speaking contestant. The most exciting moment was the announcement that Nicolet had won the Ray Rupple Award for the activities report. With these many accomplishments, the members were determined to work even harder toward a larger convention attendance and more varied activities for 1964.

### *Nicolet Holds Banquet for Businessmen*

Shortly after the state convention, election of officers was held at a business meeting. At the same time, committees were organized to begin work on the Fifth Annual Businessmen's Banquet. Each member of the chapter was assigned to start planning for the banquet. It was the feeling of the chapter that the past four banquets for businessmen had been so successful that it should be carried out every year.

The committees that were set up included food, program, invitations, hostesses, decorations, and cleanup. Some weeks in advance of the banquet, students sent an invitation to the Wisconsin FBLA state adviser, the FBLA state officers, FBLA chapter sponsors and officers in the Milwaukee area, teachers in the business education department and administrators of Nicolet High School, members of the Nicolet Board of Education, and Nicolet FBLA graduates. Another responsibility of the invitations committee was to invite as many businessmen in the area as possible so as to acquaint them with the purposes of FBLA, as well as to develop a closer relationship between the school and business.

Approximately 200 persons attended the banquet. Businessmen comprised about one-fourth of the total group in attendance. FBLA girls acted as hostesses, at which time they greeted the guests, introduced them to other groups, and made it their responsibility to sit with businessmen during the time of the dinner.

The food was contributed by FBLA members, who also prepared and served it. A short program with the FBLA president presiding followed the dinner. The program consisted of a talk by a former FBLA student. The talk was entitled "How FBLA Has Helped Me." A businessman spoke on "Opportunity Versus Security." A feature of the program was the introduction of the first honorary member to the Nicolet Chapter of FBLA, Mr. Charles Belfield of the Oster Manufacturing Company. He was chosen because of the many hours of service he has given to FBLA in helping to organize the Nicolet FBLA work day. All the guests were recognized, and the program concluded with the installation of next year's officers.

Many letters of commendation were received after the banquet. In analyzing the activity, the chapter members felt it was one of the best ways of meeting with FBLAers from other schools. Another beneficial outcome of the banquet was that several Nicolet FBLA students were offered jobs in business by the businessmen in attendance.

### *Nicolet Observes National Secretaries Week*

Another activity of the FBLA chapter was the observance of National Secretaries Week. The chapter members voted to recognize all secretaries at the Nicolet High School during this important week. They decided to honor each secretary with a long-stemmed red rose. A committee was selected, and on the first day of National Secretaries Week a group presented each secretary with this small favor on behalf of the Nicolet FBLA in order to show appreciation for all their work in helping to make the school operate efficiently as well as calling attention to the importance of the secretary in any type of business. Senior students also voted for the senior they felt most portrayed the ideal secretary.

### *Nicolet Awards Scholarship*

The biggest service project of the year was the presentation of a $100 scholarship to an FBLA student who was planning to continue his business education beyond high school. A committee was formed to do research on the possible candidates for the award. Jill Maxon, an extremely active member in the chapter for three years and a former FBLA treasurer, was selected as the recipient. The presentation of the award was made at an all-school assembly the last week of school. Jill Maxon enrolled in a business teaching course at the Wisconsin State College in Whitewater.

### *Nicolet Is Represented at National Convention*

The final event of the school year was making plans for the national convention. Five students represented Nicolet at the convention. One of the students participated in a panel discussion during the convention program. The students felt that the convention was a most stimulating experience and were confident that they could encourage many more FBLA members to attend national conventions in the future.

As usual, excitement mounted at the FBLA National Awards Banquet as the time for awards drew near. For the seventh consecutive year that the Nicolet Chapter has been in operation, it received the NBEA's Gold Seal Chapter Award, indicating that all their yearly reports were in good form at the FBLA National Office. Two blue ribbon certificates were awarded to the chapter for installing two new FBLA chapters during the year. The chapter also received a pennant for having built more FBLA chapters in the North-Central Region than any other chapter. Nicolet received fifth place in the unique project event.

Tension continued to mount until the very end of the awards banquet on the last night of the convention, because the highest FBLA award in the nation is presented at that time. The Hamden L. Forkner Award is given to the chapter with the most outstanding program of activities for the year as portrayed in a written report submitted to the FBLA National Office. When the top 10 representatives were called to the stage, Nicolet was represented. The president of the National Business Education Association presented the award in the absence of Dr. Hamden L. Forkner. He began by announcing the tenth-place school and continued on consecutively in order of rank. As the fifth-place chapter was announced, Nicolet felt encouraged as it had never placed beyond fifth place in the previous five years. As the second-place chapter was announced, Nicolet FBLAers screamed with happiness as their representative was the only one remaining—Nicolet had just been named the most outstanding chapter in the nation and were the recipients of the Hamden L. Forkner Award. With competition from all FBLA chapters in the nation, Nicolet students felt greatly rewarded for their many accomplishments entitling them to this superior rating. They concluded their busy day by making telephone calls to Wisconsin to relay the good news.

### *Nicolet Organizes for the New School Year*

The first activity of the Nicolet FBLA when school started in the fall of 1963 was an executive meeting of the FBLA officers who had been elected the previous year. The purpose of the meeting was to make arrangements for a tentative program and schedule of events for the entire school year. To promote FBLA to the student body, a list of FBLA activities and purposes was prepared for all business teachers to present to their classes. In addition, active FBLA members were appointed to give a brief talk in business classes to encourage students to join. Underclassmen and boys were particularly encouraged to become members.

Having presented the organizational materials to the business students, the executive board looked forward to knowing the total number of students who were interested in joining the chapter. The count numbered 65 members.

Local, state, and national dues were collected immediately and submitted to the national and state offices. Shortly after the membership cards were received, a meeting was held at which time the members were initiated. Following the procedures in the *FBLA Handbook*, the officers spoke on the meaning of the terms representing our title. At the conclusion of the service, the membership cards were distributed and each member was recognized with congratulations from the president. The guest speaker for the occasion was the counselor for senior boys, whose talk was entitled, "The Woman's Role in Business."

### *Nicolet Officers Prepare To Accept Responsibilities*

FBLA meetings are held after school the first and third Mondays of each month for approximately one hour. On alternating weeks, meetings are held by committees with the chairman of each committee in charge. The executive committee of FBLA is made up of the five officers and the sponsor. This group meets after school on the Thursday afternoon following regularly scheduled FBLA meetings. At this time the officers are given help and hold discussions as to how the FBLA chapter can be improved, what activities can be carried out, and what should be discussed on the agenda for each meeting. It is the responsibility of the president to keep a book prepared exclusively for the agenda of each meeting and a list of all committees appointed throughout the year. In this way, it is easy to refer to the type of business conducted at each meeting and to contact students who have been appointed to committees. It is the responsibility of the vice-president to preside at the meetings in the absence of the president and to keep attendance records. It is the responsibility of the secretary to keep accurate minutes of all meetings, write all forms and letters to be sent to the national and state office, and prepare the necessary correspondence for the business that is transacted for the chapter. These letters include contacting people to serve on programs and to send thank you letters to anyone participating in chapter activities. It is the responsibility of the treasurer to keep a simple bookkeeping system of all income and expenses. It is the responsibility of the reporter to keep the school newspaper and yearbook staff informed of all FBLA activities, take pictures of all FBLA activities, and maintain the scrapbook giving information concerning the chapter for the present school year. When committees are formed, an officer is always appointed as a coordinator. It is the responsibility of the coordinating officer to see that the committee functions properly, that meetings of the committee are held, and to report the progress of each group to the president.

### *Nicolet Sponsors Money-Making Projects*

One of the best money-making projects for the Nicolet FBLA has been the operation of the school store. At the first meeting, FBLA members were asked to sign up if they were interested in working in the store. Three students are assigned each week to take charge of the store which is open during all four lunch hours. The students act as clerks during the homeroom period opposite their lunch hour. The store is open four days during the week. The duties of the FBLA clerks consist of the following: waiting on customers, unpacking merchandise, filling the shelves, taking inventory, and proving cash at the end of the week to see that they are in agreement with the total cash sales. Although the chapter makes a profit on this project, it is carried out mainly as a service to the school. According to the records of the store kept for this school year, the largest daily sales amounted to $186.51. The total cash sales for that week were $469.50.

Another of the first money-making projects which proved successful for the year was the sale of Nicolet High School stationery. The stationery was designed previously by a committee and several reams of the letterheads were printed. The committee collated the stationery in packs of 20 letterheads and 20 envelopes and bound it in cellophane and sold it at the price of $1 a package. This project netted $20 for the school year.

Another committee was assigned to sell Nicolet pennants, and 200 were put on sale in the school store. This service project netted $10 during the school year.

### *Nicolet Informs Students Through Monthly Displays*

At one of the first meetings, members discussed the importance of keeping all Nicolet students informed of FBLA activities. It was decided to have a monthly display placed in the FBLA showcase. Committees were appointed for each month and a total of nine exhibits were set up throughout the school year. These displays included convention promotion, awards received at conventions, constant emphasis on economics, dress-right posters, and special displays directing attention to the FBLA and business activities. These displays attracted a high percentage of the student body and made them aware of the importance of the FBLA chapter in the high school.

### *Nicolet Receives Requests for Unique Project*

The school year was no more than two weeks old when numerous requests came to the chapter sponsors asking that the 1962 unique project, "The Way to FBLA," be sent to other schools. This was gratifying to the Nicolet FBLA to know that the purposes for which the project was intended were being recognized. "The Way to FBLA" portrays, through slides and a corresponding tape, the steps necessary to organize a chapter of FBLA and ways to keep it active after organization. Many schools in Wisconsin showed the film and requests from several states have been continuous throughout the school year.

### *Nicolet Campaigns for New Chapters*

The Nicolet FBLAers were still very much interested in pursuing the former national FBLA slogan, "Every Chapter Build a Chapter." In the early part of October, a committee was set up to follow through with this activity. They met and composed a letter to be sent to all schools in the Milwaukee area which do not have an FBLA chapter. If no response was received from the business teacher, the students continued their activity by placing telephone calls and personal visits to the various schools. Homestead High School invited all the Nicolet FBLA officers over and requested that each one talk on some phase of FBLA. Their discussions included FBLA activities, money-making projects, publicity, and the state and national conventions. They supplemented their talks with FBLA literature and scrapbooks. This committee functioned throughout the entire year with its major objective being that of encouraging new chapters. The goal of the group was to install at least three new chapters for the year.

### *Nicolet Again Sponsors Foster Child*

At one of the first chapter meetings of the new school year, the major item of business was a discussion as to whether the chapter should continue to make payments of $15 per month in order to keep Mei Kam Li for another year. The chapter had financed the girl and acted as her foster parents since February 1963. According to the Foster Parent Plan in New York City, an organization may discontinue its contribution at any time. There seemed to be no question in the minds of members at all, and many of the members spoke very positively on the reasons the chapter should continue this project.

### *Nicolet Participates in Homecoming Parade*

In the early part of the year, FBLAers expressed an interest in participating in the homecoming parade. A committee volunteered to plan the theme for the float, and work began immediately. The slogan on the float read, "File the Bulldogs under Defeat." It was carried out by having a Nicolet Knight open a large file and filing the opponents in a folder labeled "Defeat."

### *Nicolet Emphasizes American Education Week*

During the second week of November, American Education Week, members of the Nicolet FBLA executive board tried to emphasize the importance of education to the members of the chapter. Many brochures were distributed among the members. These brochures explained what could be done to improve the educational system in our nation as well as how grateful students should be for the opportunities available in the present educational system. One of the final outcomes of the discussion was an attractive display encouraging all members of the student body to be thankful for the fine system within their own school, state, and nation.

### *Nicolet Members Order FBLA Emblem Items*

Many students were interested in ordering FBLA emblem items for themselves. Orders were given to the president and the sponsor. A presentation of the emblem jewelry and other items was made at a meeting of the chapter.

### *Nicolet Conducts Doughnut Sale To Boost Funds*

As the chapter discussed long-range plans for projects in the future, it was apparent that another money-making project would have to be carried out. The members investigated the possibility of holding a doughnut sale, because it appeared to be the most profitable type of money-making activity. A date for the sale was submitted to the Student Council. The sale took place during all four lunch hours on November 20 and netted $38.95.

### *Nicolet Has Former Officers Speak*

At one of the November meetings two former FBLA officers were invited to speak to the group about the national convention. They were the former president and former secretary. Each had been active in FBLA activities and participated in both the state and national conventions. One talked about the business meetings and social gatherings at the national convention, and the other discussed events held during that time. Both speakers were enthusiastic about what they had gained from attendance at the convention, and encouraged present club members to do all in their power to go to the next convention.

### *Nicolet Completes Service Projects for Thanksgiving*

As Thanksgiving approached, the members felt they would like to participate in a community service project. A member of the Milwaukee Welfare Committee informed the FBLA group of the great need for coats for men in the Milwaukee House of Detention. She explained that many of the men are placed on parole during the winter months and have no coats. The chapter members acted immediately, and 20 coats were collected. Students delivered them to the House of Detention during Thanksgiving recess.

A second Thanksgiving project involved furnishing party favors for a girls' home in Milwaukee. A committee was set up and the chapter members were divided into six groups. Each group was responsible for collecting either birthday candles, mixed nuts, brownie mix, candy mix, frosting mix, or party napkins. The committee presented these gifts to the St. Rose's Catholic Home for Girls the evening before Thanksgiving.

### *Nicolet FBLAers Act As Secretaries*

December was a busy month for the Nicolet FBLA chapter. Members were assigned as secretaries to the faculty and their work consisted of preparing stencils and masters, typing manuscripts, and duplicating services. The student secretaries were responsible at all times for meeting deadlines when given an assignment by a teacher. The quality of their work had to be good or they were asked to do it over. The price scale was set up by an FBLA committee. When payment was made, the student secretary received one-half of the proceeds and the remaining one-half went into the FBLA treasury. Many times community organizations heard of the fine work of the student secretaries and also requested members to type and duplicate materials for them. For example, the Colonial Dames organization always submitted their club reports and minutes to the FBLA for typewriting and mimeographing. One large project included working for one of the Nicolet teachers who was president of the National Council of Teachers of Mathematics. Two students were in charge of the correspondence mailed from the president's office in advance of the national convention, as well as the follow-up letters. This involved 162 letters. The convention was held in Chicago and the two secretaries accompanied the president. During the time of the meetings, the girls were responsible for keeping accurate notes, transcribing them, and duplicating several copies to be distributed to those in attendance.

Another worthwhile project was the typing of approximately 300 letters for the National Council for the Social Studies. The content of each 100 letters was of a different nature and all letters were two pages in length. The first 100 letters mailed were informative and listed the many advantages of belonging to the National Council for the Social Studies. The second letter was a follow-up to those joining the organization or another letter encouraging those people to join if they did not respond to the first letter. The final letter in the series discussed the activities of the Council for the ensuing year.

### *Nicolet Builds Chapters Throughout State*

The efforts of the committee in charge of "Each Chapter Build a Chapter" paid off during the month of December. On December 5, the FBLA officers and installation chairman traveled to the Weston High School at Cazenovia to install a new FBLA chapter. The following week the same group installed a new chapter at the Central High School in West Allis. This increased the number of Wisconsin chapters to 40.

### *Nicolet Sends Gifts to the Old Folks' Home*

In the early part of December, the United Community Services Organization of Greater Milwaukee called the Nicolet chapter sponsor and suggested that the chapter might be interested in sending gifts to old folks' homes. A coordinating committee was selected, and it assigned a small article for each chapter member to buy and contribute to the cause. The items assigned were postage stamps, washcloths, facial tissues, soap, talcum powder, and stationery. After members brought their gifts, the committee wrapped them in Christmas wrappings and delivered them during Christmas vacation.

To further spread the Christmas spirit, a committee was selected to determine where the chapter members might go caroling. The committee contacted several old folks' homes, and found that many of them were interested in having a group of students entertain them with Christmas carols. In an evaluation of this project, the students felt it was a most satisfying experience, and in their conversation indicated that they would like to do more projects for elderly persons.

### *Nicolet FBLA Helps Mentally Retarded*

Because of the many benefits derived from helping the mentally retarded children during the past three years, the FBLA members again volunteered their services to the Milwaukee County Association for the Mentally Retarded. The chapter accepted the responsibility for assisting with all the work connected with the annual Christmas party for the mentally retarded. The local chairman of the Christmas party requested that the chapter members make attractive name tags for the small children. A committee worked hard on designing three different tags–Santa Claus figures for the small boys, angels for the small girls, and holly for the older children. Approximately 200 favors were made for the party. Other duties of the FBLA members helping at the party included registering, acting as hostesses, conversing with children, arranging and serving refreshments, and even helping Santa Claus distribute gifts. In a report at a chapter meeting, the 15 members participating in this service project strongly emphasized the satisfaction they received from bringing happiness to a group of this type. The participation in this project incorporated several of the 12 purposes of FBLA.

### *Nicolet Works On Operation Econ–Career Competency*

During the final chapter meetings in 1963, FBLAers began to discuss in detail the national slogan, "Operation Econ–Career Competency." Time was spent at several meetings discussing the many types of activities that might be carried out in order to emphasize the importance of economics in daily life. The discussion centered around preparation of students for the job at the high school level in order that they might display proper career competency beyond high school. It seemed that the best approach to the project was to start right in the high school by taking inventory of the equipment and facilities in the business education department. Therefore, it was decided to compile an office occupations questionnaire to be sent to businesses in the Milwaukee area. A committee was selected to do research as to the type of questions that should be included in such a survey. After the committee drew up a copy of the questionnaire, it was then presented to the teachers in the department for their suggestions and approval. A cover letter was also composed to accompany the questionnaires. FBLA students cut the stencils and duplicated them, and addressed the envelopes to be used for the project. A total of 215 questionnaires were mailed. A total of 132 businesses returned the material which was a 61 percent return. This gave a good representation of the types of equipment used in the Milwaukee area. The results were then used in the department to assist in the recommendations for the purchase of new equipment. For the most part, it was discovered that the students at Nicolet High School were receiving proper training in order to prepare them for the world of business.

### *Nicolet FBLAers Interview Graduates*

The Nicolet FBLAers felt that the economics project could not be limited to the office occupations survey which was used within the school. They believed it necessary to extend their efforts beyond the school by contacting former Nicolet FBLA graduates now employed in business to get their reactions and comments regarding the preparation they had received in business while attending high school.

A list of 65 graduates was compiled, and each member of the FBLA chapter was assigned a person to contact and interview orally for the purpose of finding out more about his job and the competencies required to be a good worker in business. FBLA members were requested to make telephone calls to the individual assigned to them and make definite arrangements as to when they could meet for a discussion. The students doing the interviewing were given the months of January and February to complete their project. Each student felt he had gained a great deal from talking with someone who had definite ideas about his job as well as the preparation he received while in high school. From the many comments heard after the interviews, it was apparent that the students gained a great deal from this type of activity and they were better informed as to the nature of skills and qualities required to get a job and hold it.

### *Nicolet FBLAers Give Economics Reports*

To pursue the economics activities even further, the group decided it would be helpful for chapter members to read articles on various phases of economics and report orally at the meetings. In the early part of January, students volunteered for the area in economics that interested them most. Reports were given at the January, February, and March meetings. The list of subjects reported are as follows:

1. A career in business teaching

2. Developing vocational competence in
   a. Bookkeeping and accounting
   b. Clerical occupations
   c. Stenographic occupations
   d. Distributive occupations
   e. Management positions
   f. Data processing
3. Economic literacy on the junior and senior high school levels.

A discussion period was held after the reports and each reporter was required to prepare a summary of his report for the economics project.

### *Nicolet Sponsors School Dance*

It is customary for the FBLA members to sponsor a dance for the entire student body and for the purpose of earning money. Because so many clubs requested to participate in a money-making project of this type, the recreation director required all organizations to submit the plan they would use for decorations and entertainment if they were given the privilege of sponsoring a dance. The FBLA committee did much planning and came up with the idea of having the theme, "A Night in the Alps." All the organizations presented their ideas at a general meeting—FBLA was again selected to sponsor the dance. A school orchestra was used for entertainment. Decorations consisted of snowflakes hanging from the ceiling and a large mural representing a skiing scene. The dance was held following a basketball game and the visiting school was invited as guests. Total proceeds amounted to $43.50.

### *Nicolet Views Stage Play*

For some weeks the FBLAers felt it would be a good experience for the group to get together for a social as well as educational function. A committee did much planning by reporting to the chapter on the many plays and concerts held in Milwaukee during January. After much discussion as to the type of cultural activity the chapter preferred, a motion was passed to attend a stage play. The play decided on was "Come Blow Your Horn." A committee proceeded by calling the theatre to check on prices of the tickets and reserve a block of seats for the group. Educational rates were granted and the committee purchased tickets at the cost of $1.50 for each member who wished to attend. In order to make a profit on this activity, the committee sold the tickets to the members for $2 each. A profit of $21.60 was realized from this project.

### *Nicolet Participates in FBLA Work Day*

Because of the great success of the FBLA work day project of the past four years, the FBLAers demanded that another one be conducted. The members felt, too, that there was no better way to carry out career competency in economics than through a project of this type. The chapter decided to have each member work at a place of business on one of three days—February 13, February 19, or February 20. On these days members had an opportunity to get practical experience in the job of their choice. The steps used by members in carrying out the project are:

1. Filled out a vocation questionnaire stating preference of a career
2. Contacted companies to make arrangements for students to work for a day
3. Compiled the questionnaires and notified students of the time they were to report on the job
4. Notified teachers of arrangements
5. Notified businesses of students expected to appear on the job and interests of respective students
6. Received a confirmation from each company showing which students appeared on the job
7. Sent thank-you letters to all of the companies participating in the project
8. Kept a file of students' evaluations on their visits and employers' evaluations of students.

All 65 chapter members participated in this project. In a final analysis of the project, FBLA members felt it was most beneficial in presenting a thorough picture of the occupation they intend to follow. The reactions of businessmen were favorable to this project. They felt their regular employees gained and learned much from meeting and working with the high school students. They encouraged Nicolet to do this again in the future.

### *Nicolet Delves Deeper into Business*

In discussing what type of activity to pursue for an annual unique project, the group decided it would like to delve deeper into business. If a project of this type were carried out, it would also add to their knowledge of economics and serve a dual purpose. The suggestion was made that the chapter members work in groups of two or three and spend a day at a particular business trying to find out as many facts as possible as to how business really operates.

The activity was presented in detail at a chapter meeting, and the members voted to work on it as a unique project. In setting up guidelines for the students to follow when they made their business visitation, several businessmen were contacted to give their ideas and suggestions as to how an activity of this type might be completed successfully. All of the ideas were accumulated and guidelines were formed which students would use during the time of their business visitation. The form was discussed thoroughly at a chapter meeting and all the steps necessary for completing this project were reviewed with the members. They were encouraged to use the form only where it applied and to come up with new ideas that would be appropriate for the type of business visitation they were assigned.

Students selected their partners as well as the place of business they preferred to visit. This was submitted to a committee which had to approve it before the students could make final arrangements. If the committee detected that too many students had signed up for the same type of business, they informed them of another business that they should observe.

Members made arrangements with their place of business so that they could spend a day visiting during spring vacation which was in March. After the students made their initial contacts by telephone to the place they intended to visit, they informed the public relations manager that this activity would not involve a mere tour through their plant. It meant digging deeply into business so that all students would have better insight as to the operation of business today.

A typical visitation included meeting the public relations director and talking to him for some time about the makeup of the business. A tour might be included in this part of the visitation. From that point, the students were referred to the heads of all departments where they asked them many questions and talked to them about the responsibilities of their individual departments in connection with the whole business. Most of the visitations took a complete day, but the students felt it was well worth their effort, and the knowledge they gained gave them a much clearer idea of how business is conducted today.

As a follow-up on this activity, each group had to make an extensive report of their visitation. They were also scheduled to give an extensive oral report to all of the chapter members. A prize was given for the best report of the business visitation.

### *Nicolet Presents Talent*

As the month of January progressed, definite plans for the state FBLA convention to be held in April began to take shape. One of the events at the convention is participation in a talent show. The Nicolet FBLA Executive board thought it would be a good plan to have all students in the chapter responsible for presenting talent at a chapter meeting, and the winner would represent Nicolet at the convention. This would also provide variety at chapter meetings. The chapter was divided into groups of six and assigned a date at which time they were responsible for demonstrating their talent. A committee decided which group was eligible to present its act at the convention.

### *Nicolet Conducts Inservice Training for Officers*

To start the second semester properly, the executive board and adviser went to lunch together at which time they discussed elaborate plans for the remaining part of the school year. Further details regarding the state convention were also discussed. It was believed that this meeting was necessary because there was too much other planning at the time of the regularly scheduled executive meetings. Five new chapter members were initiated into the chapter for the second semester.

### *Nicolet Installs Chapter*

Again there was good news for the second semester in that Sheboygan South High School invited the Nicolet FBLA officers to install a new chapter in their school. This was the third chapter built by the Nicolet members during the school year. This increased to 41 the number of chapters in Wisconsin. The installation team had high hopes that Homestead High School would complete plans for an installation before the Wisconsin state convention, but plans are indefinite at the present time.

### *Nicolet Has Guest Speaker*

For some time members had requested information on data processing. Mr. Adrian Mann, Educational Director of the Automation Institute Division of the Manpower Business Training Center, was contacted and agreed to speak to the chapter at the first meeting in March. He prefaced his talk by showing a motion picture entitled, "Careers in Business Automation." He followed up the movie with a brief explanation and talk. Chapter members were then permitted to ask questions on the subject.

Each time anyone participated or helped the FBLA chapter in any way, whether it was a talk at a chapter meeting or other chapter activities, the FBLA secretary wrote a note of appreciation to the person in an effort to create a good feeling between business and FBLA. Another method used to promote good relations was the sending of cards to any member receiving an honor in or out of school. Notes were always written in behalf of the entire chapter.

### *Nicolet Observes Dress Right Week*

The month of March showed the FBLA chapter spending a great deal of time in the emphasis of "Dress Right Week." A committee was selected in December to carry out extensive activities for "Dress Right Week" which is one of the FBLA national projects. In order to inform the entire student body about the project, a display showing proper dress was placed in the business department's showcase. A week in advance of "Dress Right Week," the committee made up several announcements which were given over the public address system to remind students of the importance of the particular week. Attractive posters were placed in the corridors so Nicolet High School students and faculty as well as visitors were made aware of "Dress Right Week." Wednesday was termed "Dress Right Day." The FBLA members requested all students to dress up for the day. Special comments recognizing the importance of proper dress were emphasized in many of the classes that day. At a chapter meeting, the committee presented a skit which portrayed how disorganized one might be if he were inappropriately dressed. Another portion of the skit showed how much easier it is to get a job if properly dressed for the interview.

To conclude the activities of this important week, the FBLA chapter viewed two movies entitled, "What Shall I Wear?" and "How To Be Well Groomed." In evaluating the projects for this week, the chapter members considered it very worth while to direct attention to proper dress in all phases of life.

### *Nicolet FBLAers Attend Career Preview Day*

The Nicolet FBLA was invited to participate in a Career Preview Clinic Program sponsored by the National Office Management Association of Milwaukee. One junior girl and three senior girls were selected to attend. The program was held on a Saturday morning. Included were sessions on business letter writing, typewriting, shorthand, business machine skills, and specific groups for the small and large business.

### *Nicolet Has Former FBLAers Speak*

In the early part of the school year, the chapter members requested to hear a talk from a former FBLA member who was enrolled in college and from another who was on the job. At the second meeting in March, the previous FBLA vice-president talked to the group on her work in college and a former winner of the FBLA public speaking event spoke to the members on her experience in business. A question and answer period followed the talks. It was interesting for the FBLAers to hear the speakers mention several times how important they felt FBLA had been to them both in college and on the job.

### *Nicolet Participates in National Business Entrance Tests Program*

For many years the Nicolet FBLA has had a desire to participate in the National Business Entrance Testing program sponsored by the FBLA parent organization, the National Business Education Association. The biggest difficulty in the past had been that the Nicolet FBLA treasury did not have a large enough balance to purchase the tests. Therefore, as one of the major objectives during this year, the members decided to enter the NBE Testing Program at least on a small scale. Thirty tests were ordered—ten in the secretarial area, ten in the typewriting area, and ten in the clerical area. The tests were administered with the idea that it would give those who took them a good experience in taking a comprehensive business test and further prepare them for any tests they might be faced with in applying for a business position. After the tests were conducted and scored, the results were then compared with national norms furnished by the national FBLA office. The results were very gratifying and the group plans to carry out the program more extensively next year.

### *Nicolet Prepares for State Convention*

March and April were busy months for state convention preparations. Twenty FBLAers participated in the spelling event sponsored by the National Office Management Association to determine who the three contestants would be in the state contest. The oral speaking event was held on April 2 to select a winner. Seven students prepared original seven-minute speeches on the purposes of FBLA and were judged by three English teachers from Nicolet High School. Fourteen members studied parliamentary procedures months in advance and the elimination session was held on March 25. Two businessmen and a secretary interviewed the three Miss FBLA candidates on March 26. The FBLA secretary prepared reports on the chapter's activities, the unique project, and the Operation Econ Project. Fifteen members were on a committee to work on the display to be exhibited at the convention. Several of the students started a campaign to enter one member for the office of state secretary and another for the office of president. Nicolet FBLA was prepared for two acts to be featured in the talent show. Another committee was responsible for encouraging members to attend the convention.

As an added interest this year, shortly before the convention, the two top speakers and parliamentary procedure teams performed at a chapter meeting. The speakers recited their original talks in order to give other chapter members an idea as to what should be incorporated in a speech of this type and to encourage others to write the following year. Each parliamentary procedure team was given special problems which they acted out in the course of a mock chapter meeting. The group felt this activity was very worthwhile as several students indicated a desire to learn more about parliamentary procedures, and it encouraged students to be more careful in the use of proper parliamentary procedure during chapter meetings.

### *Nicolet Completes Year with Convention*

The remaining time in April was spent in preparation for the state convention which was held at Green Lake. Participants continued to work hard so they would do a good job in events at the state level. Once again, the chapter members were responsible for the registration of all students in attendance at the convention.

This year in FBLA has been a busy one. The members have a feeling of accomplishment in that they participated in numerous activities throughout the year which incorporated the 12 purposes of FBLA. They feel the many projects contributed a great deal to better education, better business, and to better school and community life. Each of the 65 members feels that he has gained much because each member was on at least one committee throughout the year—the greatest percentage of members were on several committees. The Nicolet FBLA members feel, too, that it has been a "fun" and worthwhile year, and are now looking forward to the national convention in June and to another interesting and successful year in the Future Business Leaders of America.

## CONTRIBUTORS OF THE ARTICLES SELECTED FROM BUSINESS EDUCATION FORUM

RUTH I. ANDERSON. "Twenty-Five Tips for Teaching Clerical Practice." 20:22, 24; March 1966.

IROL WHITMORE BALSLEY. "Inspiring Desirable Personal Development in Students of Typewriting." 16:12-15; November 1961.

KATHLEEN BARNARD. "Standards for Promotion of Office Employees." 15:5-8; May 1961.

R. DERMONT BELL. "Standards of Preparation for Office Practice Teachers." 18:36-38; May 1964.

DORIS ANITA BERRY. "Typewriting–Office Assignment Number One." 19:7-9; November 1964.

MARY MARGARET BRADY. "A New Contour for the Clerical Program." 16:5-7; February 1962.

RUTH B. CARTER. "Standards of Personal Conduct for the Office Worker." 18:32-33; May 1964.

KATHLEEN H. CASAD. "A Teaching Plan for Shorthand II." 19:17, 23-24; April 1965.

ETHEL R. CHRISMAN. "Standards of Promotion for Beginning Office Workers." 18:27-29; May 1964.

L. MILLARD COLLINS. "Teach for Office Employment." 19:21-22; April 1965.

ARNOLD CONDON. "Improving Shorthand Learning Through Better Use of New Media and Equipment." 21:10-12; October 1966.

T. JAMES CRAWFORD. "Typewriting and the Vocational Education Act of 1963." 18:18; March 1964 and 18:24; April 1964.

GORDON F. CULVER AND ELSIE M. JEVONS. "A Career in the Secretarial Occupations." 19:1-3; January 1965.

HAZEL A. FLOOD. "Helping Students Meet Office Standards in Transcription." 16:28-29; April 1962.

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ALBERTA FRERICHS. "Practical Standards for Machine Transcribers." 16:22-23; February 1962.

VERN FRISCH. "Preparing Students for Office Occupation." Written for 1967 National Business Education Yearbook.

HARRY L. GIBSON. "Teaching Students How To Listen." 19:22; March 1965.

JOHN C. GILLIAM AND JAMES ZANCANELLA. "Stencil Duplicating." 16:14-16; May 1962.

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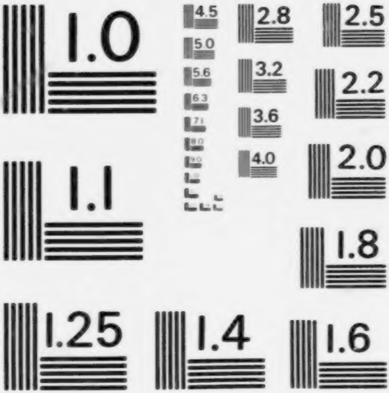
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MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A

Enoch J. Haga. "What Automation Means for Bookkeeping." 20:14-15, 18; December 1965.

A. Lee Hall. "Office Standards for Male Employees." 18:30-31; May 1964.

Robert E. Hoskinson. "Try a Cost Approach to Accuracy." 18:17, 22; November 1963.

Harry Jasinski. "Bookkeeping as Preparation for Employment." 17:14-15; December 1962.

Don Jester. "Preview Transcription Too!" 19:15, 20; November 1964.

Margaret Johnson. "Let's Educate Counselors and Parents." 20:9-10; October 1965.

Mina M. Johnson. "Standardization of Professionalism for the Secretary." 19:24-25; December 1964.

Norman F. Kallaus. "Data Communications: New Term, New Concept, New Challenge." 20:7-8; February 1966.

Irene D. Kreidberg. "Records Management–A Must." 18:23-24; March 1964.

Dorothy Lee. "Involvement Instead of Inertia." 20:11-12; October 1965.

Jeanette Lewis. "Evolving Standards in Transcription." 19:21, 25-26; May 1965.

Parker Liles. "Wanted–A Specialized Office Clerical Curriculum." 20:28, 33; April 1966.

Veda A. Long. "Transcription Profits Through "Block of Time Scheduling." 21:13-15; October 1966.

Yvonne Lovely. "Standards of Office Etiquette for the Businesswoman." 19:16-17; May 1965.

Helen Lundstrom. "Flexibility in Standards." 19:23-24; January 1965.

Robert D. MacDonald. "Make Systems a Part of Bookkeeping." 20:19, 25; May 1966.

Eleanor Maliche. "Changing Patterns in Office Work." 20:15-17; February 1966.

Elizabeth N. Martin. "Carbon Duplicating." 16:7-8; May 1862.

Barbara Marting. "Preparing Typists for Modern Offices." 17:19, 32; April 1963.

Ralph E. Mason. "Effective Cooperative Business Education Programs." 16:21, 23-24; February 1962 and 16:30-31; March 1962.

Gerald W. Maxwell. "Review in Bookkeeping Instruction." 14:30-31; March 1960.

Elizabeth Melson. "Work Simplification for Stenographers." 13:21, 23; May 1959.

Belden Menkus. "What Office Training Teachers Should Tell Students About Copiers." 21:25-26; October 1966.

Louise A. Merritt. "Paperwork . . . Paperwork . . . Paperwork! 21:19-20; November 1966.

Kelvin G. Miller, Paul R. Long, and Richard W. Byrd. "Center Bookkeeping Around the Individual." 15:11-13; December 1960.

Donald J. D. Mulkerne. "Our Students Need More Responsibility." 16:25, 28, 35; October 1961.

Mary Ellen Oliverio. "Teaching Clerical Practice Students How To Work." 20:26, 31; January 1966.

Philip S. Pepe. "Teach More of Less in Typewriting." 16:17, 20; February 1962.

John C. Peterson. "Ten 'Musts' for Advanced Typewriting." 17:10-11, 18; November 1962.

Irene Place. "Information Economics." 20:20, 24; May 1966.

Carol Price. "Television, the 21-Inch Classroom." 15:33, 35; December 1960.

Pearl T. Raines. "Selecting Work Stations for Cooperative Part-Time Students." 18:34-36; May 1964.

Mildred E. Reed. "An Eclectic Method for Developing Transcription Skill." 15:13-17, 23; October 1960.

Mary F. Robek. "Data Processing." 18:41, 46-48; May 1964.

John L. Rowe. "Standards in Vocational Typewriting." 20:5-7; May 1966.

Robert J. Ruegg. "Touch Shorthand and Transcription." Written for 1967 National Business Education Yearbook.

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Joe W. Sawyer. "Typewriting Standards for Office Occupations—Are They Realistic?" 19:11-12; May 1965.

Arnold E. Schneider. "The Impact of Information Processing on the Development of Clerical Employees." 20:9-11; February 1966.

Bruce C. Shank. "Applied Practice Projects for Typewriting Classes." 19:20, 27-28; March 1965.

Frances Smutz. "Cooperative Work Programs for Secondary School Students." 16:15, 20; February 1962.

Jane Stewart. "On These Things We Agree in the Teaching of Shorthand and Transcription." 19:7-9; October 1964.

Jesse F. Teel, Jr. "Enriching Bookkeeping Classes by Integrating Economics." 21:10-12; December 1966.

Elizabeth Van Derveer Tonne. "The Multiple-Listening Station in Shorthand Speed Building." 18:13-14, 17; October 1963.

Ellamaye Webb Van Fleet. "For What Are We Training Typewriting Students?" 18:20, 26; February 1964.

Jean Voyles. "Standards for Written Communications." 19:13-14; May 1965.

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Anne Weinerman. "Improving Shorthand Learning Through Emphasis on the Mailable Letter." 21:15-16; October 1966.

Mildred Andra Witten. "The Relationship of the Clerical Program to Business." 14:7-9; February 1960.

Marion Wood. "Standards for Job Proofing." 19:25-27; February 1965.

## NATIONAL BUSINESS EDUCATION ASSOCIATION

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